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Worldwide IT Spending, 2002–2007: The Worldwide Black Book, 2003

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MARKET ANALYSIS

Worldwide IT Spending, 2002–2007: The Worldwide Black Book, 2003

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IDC OPINION

Worldwide IT spending has remained broadly stable but tepid in the first half of the year, with economic stability in the United States not yet translating into a major uptick in corporate spending and international markets clouded by uncertainty, particularly in Europe. For the full year, we now expect to see a slight increase of 1% in overall IT spending, compared with 2002. In addition:

- IDC forecasts that the worldwide IT services market will increase to $454.8 billion at a 6.2% compound annual growth rate (CAGR) over the full five-year forecast period ending in 2007.

- The worldwide application software market will recover to post 3% growth in 2003, a welcome but gradual recovery from the down/flat years of 2001 and 2002. This growth will accelerate in 2004 to 5%, and will reach 7% in 2005.

- The long-range PC forecast calls for worldwide growth of 2% next year, reaching 4% in 2005. With most of the growth to be found in emerging markets, the United States will see a temporary recovery to positive PC spending growth next year before another period of decline follows the upgrade/replacement cycle.

- We remain optimistic about longer-term opportunities in the network service provider (NSP) infrastructure arena, especially from 2005 to 2007. With the longer-term recovery in NSP capital expenditure (capex), network equipment growth rates will recover significantly from 2005.

- Overall, the server market is expected to see a total decline of 4% in terms of customer spending this year, largely due to declines in Europe (13%) and Japan (8%).

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IN THIS STUDY

METHODOLOGY

This study is based upon IDC's wide-ranging research into the global IT market and a worldwide set of definitions introduced in 1990. Thus, the data within this document is entirely consistent with that used in other documents conforming to the same standard. The intention is to present a reliable and consistent view of the complete worldwide IT market.

This study does not attempt to cover the subject of the internal expenditure of IT departments. As a result, where internal expenditure is switched to external suppliers, IDC registers this as an increase in market growth.

The methodology used in the compilation of this document is based on IDC's research structure, which consists of numerous national research offices and a smaller number of panregional expertise centers. Market data is collected from both national research offices and panregional research centers. Research is collected on the individual IT markets of 53 countries as well as on vendors operating in the same area.

Contributing expertise centers include the following:

- Commercial systems
- Workstations
- Personal systems
- Networking equipment
- Printers
- Storage
- Software
- Services

Country research offices are based in the following countries/regions:

- United States
- Canada
- Western Europe
- Asia/Pacific
- Japan
- Latin America
- Eastern Europe
- Middle East
- South Africa

The forecasts used in this study have in some cases been modified since their earlier publication under other programs. Such modifications are routine and reflect the natural adjustment of forecasts, and in some cases historical data, to take new information into account. Clients of several programs should contact IDC for information concerning specific modifications.

Note: All numbers in this document may not be exact due to rounding.

DEFINITIONS

For a comprehensive set of definitions and methodology, please refer to *IDC's Worldwide Black Book Taxonomy, 2003* (IDC #29431, May 2003). Since this document was published in May, the following change to the taxonomy should be noted: The printers category, which previously included only single-function printers as detailed in the document referenced above, now also includes multifunction peripherals (MFPs). The impact of this is a net increase in both market sizing and growth rates (due to replacement of single-function printers by MFPs in many organizations).

SITUATION OVERVIEW

Worldwide IT spending has remained broadly stable but tepid in the first half of the year, with economic stability in the United States not yet translating into a major uptick in corporate spending and international markets clouded by uncertainty, particularly in Europe. For the full year, we now expect to see a slight increase of 1% in overall IT spending, compared with 2002 (see Figure 1).

Pent-up demand, infrastructure upgrades, and product innovation will drive the gradual IT spending recovery over the next two years as the industry returns to a rate of expansion in excess of general economic growth. Offsetting these trends in 2003 is the current corporate focus on short-term value, costs, and returns. Pricing pressures continue to impact hardware spending, and vendor consolidation is expected to continue. Gradual recovery in software and services will translate into positive growth this year, with further improvements during 2004.

Pent-up demand, infrastructure upgrades, and product innovation will drive the gradual IT spending recovery over the next two years as the industry returns to a rate of expansion in excess of general economic growth.

International markets continue to show volatility. The softening of economic conditions in Europe, particularly Germany, has dampened IT budgets. The strength of the euro, while positively impacting U.S. dollar revenue growth for many IT suppliers, has added to the challenges facing the overall economy and IT market. A similar story is observed in Canada, where currency pressures are impacting corporate spending on IT. In Japan, persistent deflation and economic stagnation continue to depress IT markets, with a 1% decline in overall spending expected for 2003. Growth in Japan will recover to 3% in 2004, assuming economic stability and recovery.

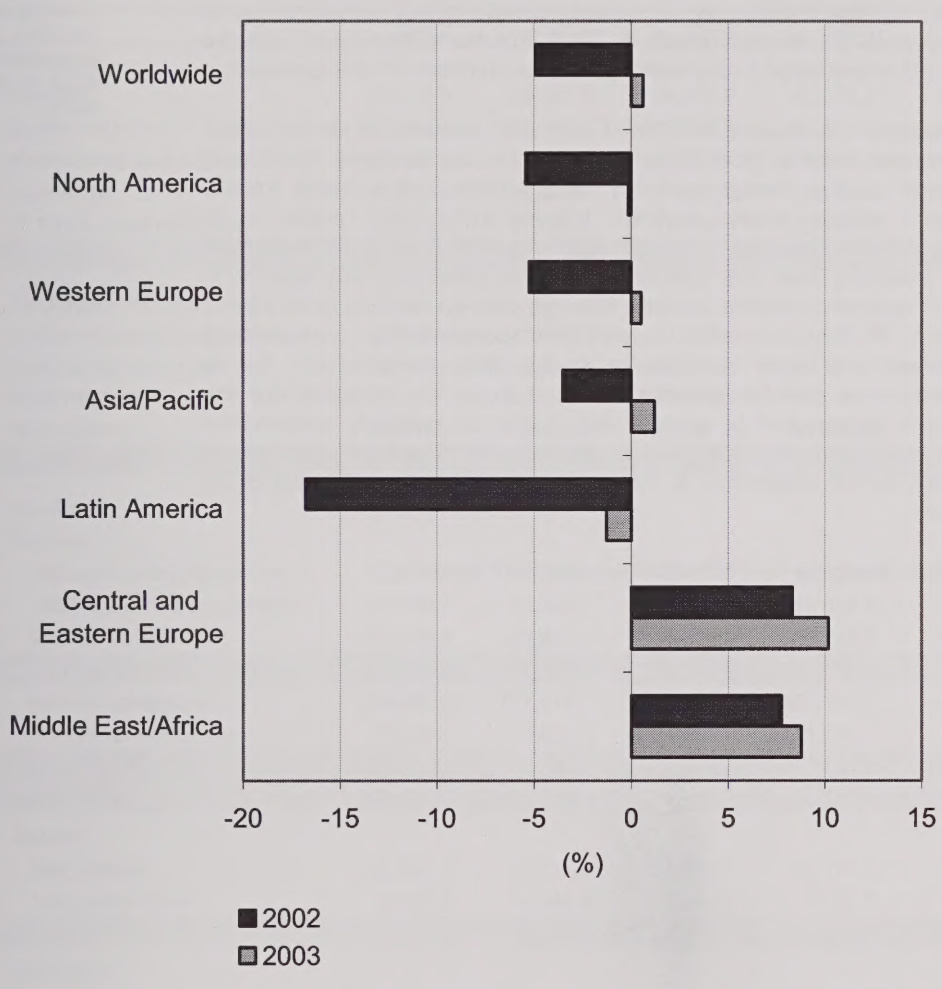
Emerging markets continue to offer brighter growth prospects, with China expected to see 8% growth in 2003, rising to 16% in 2004. Other bright spots this year include India, Thailand, Spain, Russia, and South Africa. Stronger growth is expected in most markets next year, as economic recovery translates into budget increases. The U.S. market will recover to 4% growth in 2004.

Emerging markets continue to offer brighter growth prospects, with China expected to see 8% growth in 2003, rising to 16% in 2004.

Overall, 2004 will see a recovery to 5% worldwide IT spending growth, rising to 7% growth in 2006 but falling short of double-digit expansion for the foreseeable future. This forecast assumes various components, including economic growth on the upside and a lack of technology paradigm shifts on the downside. The legendary (some say mythical) "killer app" has the potential to fuel more rapid growth, while economic stagnation would quickly derail the upward momentum.

FIGURE 1

WORLDWIDE IT SPENDING GROWTH BY REGION, 2002 AND 2003



Source: IDC, June 2003

Mobile computing will be a key growth trend in the next few years, with rapid adoption of converged voice/data handheld devices. The launch of 3G services will likely fuel IT spending on related applications and services, though not at the rate anticipated at the peaks of the hype in 1999/2000. Growth of broadband in consumer households will continue at a rapid pace. Corporations will focus on technology that simplifies and optimizes existing business and IT functions, at least in the short term, with cost efficiency a more compelling proposition than radical shifts in business models and dynamics. Web services and open source software will be key activity areas.

Corporations will focus on technology that simplifies and optimizes existing business and IT functions, at least in the short term, with cost efficiency a more compelling proposition than radical shifts in business models and dynamics.

The trend toward outsourcing of specific IT functions will continue, as will the demand for product standardization and integration. In 2004, the PC market will see its first year of overall positive revenue growth since 2000, but this growth will be short lived in the mature, saturated market of the United States. Stronger hardware growth will come from volume and midrange servers, with storage hardware growth largely eclipsed by a stronger focus on storage management software. Spending on system infrastructure software, particularly security-related products, will outpace other sectors to increase by 6% next year.

A more positive story will be the recovery of network equipment markets. With the telecom winter expected to end around 2005, according to current metrological forecasts, this will translate into a rapid uptick in equipment sales. Growth of voice over IP will be another significant driver, as will wireless service rollout, propelling overall equipment spending to double-digit growth in 2006. For the current year, with the telecom industry still largely mired in depression, a 2% decline from 2002 is expected.

With the telecom winter expected to end around 2005, according to current metrological forecasts, this will translate into a rapid uptick in equipment sales.

Overall, it is reasonable to observe that the IT spending recovery is already under way but that the pace remains slow. IT vendor revenue has improved significantly during the second quarter, though currency factors have had a major impact. Corporate decision makers remain cautious, but we expect this caution to be gradually eroded by the anticipated recovery in business profits and confidence. With a psychological overhang from the past few years still persisting, any kind of V-shaped snap to IT spending remains unlikely (although pent-up demand could have a surprising impact if the economy outperforms conservative expectations). International markets are more troublesome in the short term, largely due to economic problems rather than fundamental IT-related issues. Our forecasts are now focused toward the bottom end of expectations, based on relatively conservative assumptions. As always, much will depend on the outcome of various unpredictable wild cards, but the overall momentum is broadly positive for the second half of the year and into 2004.

Tables 1–3 illustrate forecasts for 2002–2007 worldwide IT spending.

TABLE 1

WORLDWIDE IT SPENDING, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	37,014.9	36,967.3	38,242.9	40,274.3	42,929.1	45,769.8
Implementation	133,386.0	134,010.9	138,983.2	146,624.8	156,652.5	167,349.6
Maintenance and support	92,407.8	95,626.7	100,086.7	106,666.2	114,725.7	123,293.7
Operations	65,603.2	69,576.7	74,276.2	79,959.4	86,368.1	92,973.9
IT training and education	21,671.7	21,400.9	21,704.6	22,444.8	23,886.2	25,423.9
Services total	350,083.7	357,582.5	373,293.5	395,969.4	424,561.7	454,811.0
Packaged software						
System infrastructure software	45,606.0	47,626.9	50,676.6	54,556.7	59,046.6	63,855.2
Appl. development and deployment	39,141.0	40,229.0	42,333.6	45,464.1	49,439.5	53,667.6
Applications	86,061.3	88,311.9	92,867.3	99,430.0	106,808.4	113,576.2
Packaged software total	170,808.2	176,167.9	185,877.5	199,450.8	215,294.5	231,099.0
Hardware						
Systems						
High-end enterprise servers	13,362.5	11,811.0	11,476.3	11,227.4	11,196.4	10,946.3
Midrange enterprise servers	14,768.1	13,454.2	14,022.5	14,665.9	14,777.3	15,642.8
Volume servers	21,056.4	21,981.3	24,009.1	25,748.3	28,009.8	29,383.2
Servers total	49,186.9	47,246.5	49,507.9	51,641.5	53,983.5	55,972.3
Personal computers	154,481.0	147,014.1	150,450.8	156,653.7	160,312.6	164,549.5
Traditional workstations	2,354.5	1,675.2	1,288.7	1,048.2	878.2	780.4
Clients total	156,835.6	148,689.3	151,739.5	157,701.9	161,190.8	165,329.9
Systems total	206,022.5	195,935.8	201,247.4	209,343.4	215,174.3	221,302.2
Storage						
Disk systems	21,580.4	21,077.4	21,374.7	22,197.6	23,093.2	23,865.1
Tape automation	2,929.3	2,947.9	3,046.8	3,190.0	3,346.2	3,535.4
Storage total	24,509.6	24,025.3	24,421.5	25,387.6	26,439.5	27,400.6
Peripherals						
Printers and MFPs	41,089.6	43,127.0	44,948.6	46,647.5	48,357.0	49,718.1
Smart handheld devices	7,477.5	10,952.7	16,694.7	23,103.4	29,367.3	35,546.0
Other add-ons	12,713.4	11,576.0	11,728.9	12,061.3	12,734.5	13,089.2
Peripherals total	61,280.4	65,655.7	73,372.1	81,812.2	90,458.7	98,353.2
Networking equipment	50,435.3	49,468.4	52,116.8	56,423.4	61,949.3	67,716.9
Hardware total	342,247.9	335,085.3	351,157.8	372,966.6	394,021.9	414,772.9
Packaged software total	170,808.2	176,167.9	185,877.5	199,450.8	215,294.5	231,099.0
Services total	350,083.7	357,582.5	373,293.5	395,969.4	424,561.7	454,811.0
Total IT	863,139.8	868,835.6	910,328.8	968,386.8	1,033,878.1	1,100,682.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 2

GROWTH IN WORLDWIDE IT SPENDING, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-0.1	3.5	5.3	6.6	6.6	5.5
Implementation	0.5	3.7	5.5	6.8	6.8	5.7
Maintenance and support	3.5	4.7	6.6	7.6	7.5	6.6
Operations	6.1	6.8	7.7	8.0	7.6	7.5
IT training and education	-1.2	1.4	3.4	6.4	6.4	4.4
Services total	2.1	4.4	6.1	7.2	7.1	6.2
Packaged software						
System infrastructure software	4.4	6.4	7.7	8.2	8.1	7.6
Appl. development and deployment	2.8	5.2	7.4	8.7	8.6	7.5
Applications	2.6	5.2	7.1	7.4	6.3	6.5
Packaged software total	3.1	5.5	7.3	7.9	7.3	7.0
Hardware						
Systems						
High-end enterprise servers	-11.6	-2.8	-2.2	-0.3	-2.2	-1.9
Midrange enterprise servers	-8.9	4.2	4.6	0.8	5.9	3.8
Volume servers	4.4	9.2	7.2	8.8	4.9	7.5
Servers total	-3.9	4.8	4.3	4.5	3.7	4.3
Personal computers	-4.8	2.3	4.1	2.3	2.6	2.9
Traditional workstations	-28.9	-23.1	-18.7	-16.2	-11.1	-17.4
Clients total	-4.8	2.3	4.1	2.3	2.6	2.9
Systems total	-4.9	2.7	4.0	2.8	2.8	3.1
Storage						
Disk systems	-2.3	1.4	3.8	4.0	3.3	3.2
Tape automation	0.6	3.4	4.7	4.9	5.7	4.6
Storage total	-2.0	1.6	4.0	4.1	3.6	3.3
Peripherals						
Printers and MFPs	5.0	4.2	3.8	3.7	2.8	3.6
Smart handheld devices	46.5	52.4	38.4	27.1	21.0	34.2
Other add-ons	-8.9	1.3	2.8	5.6	2.8	3.1
Peripherals total	7.1	11.8	11.5	10.6	8.7	10.6
Networking equipment	-1.9	5.4	8.3	9.8	9.3	8.2
Hardware total	-2.1	4.8	6.2	5.6	5.3	5.5
Packaged software total	3.1	5.5	7.3	7.9	7.3	7.0
Services total	2.1	4.4	6.1	7.2	7.1	6.2
Total IT	0.7	4.8	6.4	6.8	6.5	6.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 3

PROPORTIONS OF WORLDWIDE IT SPENDING CATEGORIES, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.3	4.2	4.2	4.2	4.2
Implementation	15.5	15.4	15.3	15.1	15.2	15.2
Maintenance and support	10.7	11.0	11.0	11.0	11.1	11.2
Operations	7.6	8.0	8.2	8.3	8.4	8.4
IT training and education	2.5	2.5	2.4	2.3	2.3	2.3
Services total	40.6	41.2	41.0	40.9	41.1	41.3
Packaged software						
System infrastructure software	5.3	5.5	5.6	5.6	5.7	5.8
Appl. development and deployment	4.5	4.6	4.7	4.7	4.8	4.9
Applications	10.0	10.2	10.2	10.3	10.3	10.3
Packaged software total	19.8	20.3	20.4	20.6	20.8	21.0
Hardware						
Systems						
High-end enterprise servers	1.5	1.4	1.3	1.2	1.1	1.0
Midrange enterprise servers	1.7	1.5	1.5	1.5	1.4	1.4
Volume servers	2.4	2.5	2.6	2.7	2.7	2.7
Servers total	5.7	5.4	5.4	5.3	5.2	5.1
Personal computers	17.9	16.9	16.5	16.2	15.5	14.9
Traditional workstations	0.3	0.2	0.1	0.1	0.1	0.1
Clients total	17.9	16.9	16.5	16.2	15.5	14.9
Systems total	23.9	22.6	22.1	21.6	20.8	20.1
Storage						
Disk systems	2.5	2.4	2.3	2.3	2.2	2.2
Tape automation	0.3	0.3	0.3	0.3	0.3	0.3
Storage total	2.8	2.8	2.7	2.6	2.6	2.5
Peripherals						
Printers and MFPs	4.8	5.0	4.9	4.8	4.7	4.5
Smart handheld devices	0.9	1.3	1.8	2.4	2.8	3.2
Other add-ons	1.5	1.3	1.3	1.2	1.2	1.2
Peripherals total	7.1	7.6	8.1	8.4	8.7	8.9
Networking equipment	5.8	5.7	5.7	5.8	6.0	6.2
Hardware total	39.7	38.6	38.6	38.5	38.1	37.7
Packaged software total	19.8	20.3	20.4	20.6	20.8	21.0
Services total	40.6	41.2	41.0	40.9	41.1	41.3
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

FUTURE OUTLOOK

FORECAST AND ASSUMPTIONS

IT SERVICES

IDC predicts moderate growth for the worldwide IT services market over the next five years. Specifically, IDC forecasts that the worldwide IT services market will increase to $454.8 billion at a 6.2% CAGR over the full five-year period ending in 2007. In the short term, continued economic and geopolitical concerns will constrain spending. For 2003, IDC forecasts 2% growth — although much of this will occur in the latter half of the year.

The global market continues to be plagued by depressed economies and sluggish business profits across the Americas, Western Europe, and Japan. Outsourcing of all types is becoming the dominant engine of industry growth as companies continue to hand off an increasing portion of IT responsibility to external providers. Growth across all IT services segments is driven more by a shift in corporate budgets from internal to external spending than by any increase in aggregate spending on IT. Customers remain unwilling to make large IT investments without clearly understanding and defining return on investment (ROI). Furthermore, there is a lack of compelling new technologies driving growth, and most IT services remain focused on either optimizing prior investments or reducing costs in operating current IT environments.

Outsourcing of all types is becoming the dominant engine of industry growth as companies continue to hand off an increasing portion of IT responsibility to external providers.

The dramatic price declines experienced within many IT services markets in 2002 will not be repeated in 2003. Although IDC believes the past price declines are now permanent and will not reverse, we do not anticipate a continued erosion in pricing at the rate witnessed during 2002. There are two primary reasons for our belief in a relative stabilization of rates. First, the dramatic turmoil that beset the consulting arms of audit companies has, for the most part, played out through spin-offs and acquisitions. Second, the leading offshore services firms are now facing the need to build up a local (primarily U.S. and European) presence as they seek to move up the IT services value chain. This will lead to a moderately higher cost structure and lower the price differential they are able to offer.

Tables 4–23 illustrate forecasts for IT services market spending from 2002 to 2007, with detail for the activities of planning, implementation, maintenance and support, operations, and IT training and education.

TABLE 4

WORLDWIDE PLANNING SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	18,824.1	18,552.9	18,996.3	19,774.5	20,795.2	21,849.4
Western Europe	10,560.5	10,545.2	10,721.3	11,177.1	11,928.9	12,703.8
Asia/Pacific	5,777.9	5,926.1	6,337.6	6,824.8	7,399.6	8,067.7
Latin America	780.5	757.7	840.8	936.7	1,035.1	1,142.2
Central and Eastern Europe	513.8	581.4	658.2	775.5	895.2	1,035.4
Middle East/Africa	558.2	604.0	688.7	785.7	875.2	971.4
Worldwide	37,014.9	36,967.3	38,242.9	40,274.3	42,929.1	45,769.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 5

GROWTH IN WORLDWIDE PLANNING SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-1.4	2.4	4.1	5.2	5.1	4.2
Western Europe	-0.1	1.7	4.3	6.7	6.5	4.8
Asia/Pacific	2.6	6.9	7.7	8.4	9.0	8.0
Latin America	-2.9	11.0	11.4	10.5	10.3	10.8
Central and Eastern Europe	13.2	13.2	17.8	15.4	15.7	15.5
Middle East/Africa	8.2	14.0	14.1	11.4	11.0	12.6
Worldwide	-0.1	3.5	5.3	6.6	6.6	5.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 6

PROPORTIONS OF WORLDWIDE PLANNING SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	50.9	50.2	49.7	49.1	48.4	47.7
Western Europe	28.5	28.5	28.0	27.8	27.8	27.8
Asia/Pacific	15.6	16.0	16.6	16.9	17.2	17.6
Latin America	2.1	2.0	2.2	2.3	2.4	2.5
Central and Eastern Europe	1.4	1.6	1.7	1.9	2.1	2.3
Middle East/Africa	1.5	1.6	1.8	2.0	2.0	2.1
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 7

PLANNING AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.2	2.1	2.1	2.0	2.0	2.0
Western Europe	1.2	1.2	1.2	1.2	1.2	1.2
Asia/Pacific	0.7	0.7	0.7	0.7	0.7	0.7
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	4.3	4.3	4.2	4.2	4.2	4.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 8

WORLDWIDE IMPLEMENTATION SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	62,422.2	61,939.3	63,702.1	66,651.4	70,488.9	74,370.5
Western Europe	42,612.2	42,643.1	43,254.3	44,898.2	47,663.5	50,623.9
Asia/Pacific	21,024.5	21,687.1	23,338.6	25,231.0	27,452.3	29,967.6
Latin America	2,998.3	2,919.1	3,210.9	3,555.4	3,923.6	4,314.5
Central and Eastern Europe	2,052.3	2,334.6	2,649.5	3,040.5	3,476.3	3,980.7
Middle East/Africa	2,276.5	2,487.7	2,827.8	3,248.2	3,647.9	4,092.4
Worldwide	133,386.0	134,010.9	138,983.2	146,624.8	156,652.5	167,349.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 9

GROWTH IN WORLDWIDE IMPLEMENTATION SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-0.8	2.8	4.6	5.8	5.5	4.7
Western Europe	0.1	1.4	3.8	6.2	6.2	4.4
Asia/Pacific	3.2	7.6	8.1	8.8	9.2	8.4
Latin America	-2.6	10.0	10.7	10.4	10.0	10.3
Central and Eastern Europe	13.8	13.5	14.8	14.3	14.5	14.3
Middle East/Africa	9.3	13.7	14.9	12.3	12.2	13.3
Worldwide	0.5	3.7	5.5	6.8	6.8	5.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 10

PROPORTIONS OF WORLDWIDE IMPLEMENTATION SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	46.8	46.2	45.8	45.5	45.0	44.4
Western Europe	31.9	31.8	31.1	30.6	30.4	30.3
Asia/Pacific	15.8	16.2	16.8	17.2	17.5	17.9
Latin America	2.2	2.2	2.3	2.4	2.5	2.6
Central and Eastern Europe	1.5	1.7	1.9	2.1	2.2	2.4
Middle East/Africa	1.7	1.9	2.0	2.2	2.3	2.4
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 11

IMPLEMENTATION AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	7.2	7.1	7.0	6.9	6.8	6.8
Western Europe	4.9	4.9	4.8	4.6	4.6	4.6
Asia/Pacific	2.4	2.5	2.6	2.6	2.7	2.7
Latin America	0.3	0.3	0.4	0.4	0.4	0.4
Central and Eastern Europe	0.2	0.3	0.3	0.3	0.3	0.4
Middle East/Africa	0.3	0.3	0.3	0.3	0.4	0.4
Worldwide	15.5	15.4	15.3	15.1	15.2	15.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 12

WORLDWIDE MAINTENANCE AND SUPPORT SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	45,305.0	47,737.9	50,775.1	54,892.7	59,496.4	64,217.2
Western Europe	29,663.1	30,027.0	30,432.9	31,539.5	33,344.6	35,290.1
Asia/Pacific	13,070.3	13,304.3	13,849.6	14,623.8	15,655.9	16,847.2
Latin America	2,007.1	1,957.3	2,131.9	2,351.6	2,593.0	2,848.1
Central and Eastern Europe	1,070.0	1,195.9	1,331.9	1,506.8	1,715.4	1,962.0
Middle East/Africa	1,292.2	1,404.3	1,565.3	1,751.7	1,920.4	2,129.2
Worldwide	92,407.8	95,626.7	100,086.7	106,666.2	114,725.7	123,293.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 13

GROWTH IN WORLDWIDE MAINTENANCE AND SUPPORT SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	5.4	6.4	8.1	8.4	7.9	7.7
Western Europe	1.2	1.4	3.6	5.7	5.8	4.1
Asia/Pacific	1.8	4.1	5.6	7.1	7.6	6.1
Latin America	-2.5	8.9	10.3	10.3	9.8	9.8
Central and Eastern Europe	11.8	11.4	13.1	13.8	14.4	13.2
Middle East/Africa	8.7	11.5	11.9	9.6	10.9	11.0
Worldwide	3.5	4.7	6.6	7.6	7.5	6.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 14

PROPORTIONS OF WORLDWIDE MAINTENANCE AND SUPPORT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	49.0	49.9	50.7	51.5	51.9	52.1
Western Europe	32.1	31.4	30.4	29.6	29.1	28.6
Asia/Pacific	14.1	13.9	13.8	13.7	13.6	13.7
Latin America	2.2	2.0	2.1	2.2	2.3	2.3
Central and Eastern Europe	1.2	1.3	1.3	1.4	1.5	1.6
Middle East/Africa	1.4	1.5	1.6	1.6	1.7	1.7
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 15

MAINTENANCE AND SUPPORT AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	5.2	5.5	5.6	5.7	5.8	5.8
Western Europe	3.4	3.5	3.3	3.3	3.2	3.2
Asia/Pacific	1.5	1.5	1.5	1.5	1.5	1.5
Latin America	0.2	0.2	0.2	0.2	0.3	0.3
Central and Eastern Europe	0.1	0.1	0.1	0.2	0.2	0.2
Middle East/Africa	0.1	0.2	0.2	0.2	0.2	0.2
Worldwide	10.7	11.0	11.0	11.0	11.1	11.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 16

WORLDWIDE OPERATIONS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	32,791.9	35,091.1	37,780.0	40,626.6	43,495.5	46,415.8
Western Europe	19,912.4	20,841.5	21,756.2	23,165.4	25,012.3	26,799.5
Asia/Pacific	10,879.3	11,506.4	12,285.7	13,318.4	14,585.0	16,048.3
Latin America	1,149.1	1,138.8	1,301.4	1,500.4	1,720.1	1,947.1
Central and Eastern Europe	264.7	317.9	377.2	468.9	574.9	687.5
Middle East/Africa	605.9	680.9	775.7	879.7	980.3	1,075.7
Worldwide	65,603.2	69,576.7	74,276.2	79,959.4	86,368.1	92,973.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 17

GROWTH IN WORLDWIDE OPERATIONS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	7.0	7.7	7.5	7.1	6.7	7.2
Western Europe	4.7	4.4	6.5	8.0	7.1	6.5
Asia/Pacific	5.8	6.8	8.4	9.5	10.0	8.7
Latin America	-0.9	14.3	15.3	14.6	13.2	14.3
Central and Eastern Europe	20.1	18.7	24.3	22.6	19.6	21.3
Middle East/Africa	12.4	13.9	13.4	11.4	9.7	12.1
Worldwide	6.1	6.8	7.7	8.0	7.6	7.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 18

PROPORTIONS OF WORLDWIDE OPERATIONS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	50.0	50.4	50.9	50.8	50.4	49.9
Western Europe	30.4	30.0	29.3	29.0	29.0	28.8
Asia/Pacific	16.6	16.5	16.5	16.7	16.9	17.3
Latin America	1.8	1.6	1.8	1.9	2.0	2.1
Central and Eastern Europe	0.4	0.5	0.5	0.6	0.7	0.7
Middle East/Africa	0.9	1.0	1.0	1.1	1.1	1.2
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 19

OPERATIONS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	3.8	4.0	4.2	4.2	4.2	4.2
Western Europe	2.3	2.4	2.4	2.4	2.4	2.4
Asia/Pacific	1.3	1.3	1.3	1.4	1.4	1.5
Latin America	0.1	0.1	0.1	0.2	0.2	0.2
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	7.6	8.0	8.2	8.3	8.4	8.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 20

WORLDWIDE IT TRAINING AND EDUCATION SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	10,191.2	9,867.7	9,836.1	10,002.3	10,612.9	11,347.0
Western Europe	7,653.0	7,563.8	7,546.8	7,678.3	8,024.2	8,285.1
Asia/Pacific	2,999.1	3,089.5	3,331.4	3,637.4	3,964.0	4,345.9
Latin America	323.7	311.3	337.2	368.9	402.1	438.1
Central and Eastern Europe	267.1	305.7	346.8	400.5	474.8	549.9
Middle East/Africa	237.6	262.9	306.4	357.3	408.2	457.8
Worldwide	21,671.7	21,400.9	21,704.6	22,444.8	23,886.2	25,423.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 21

GROWTH IN WORLDWIDE IT TRAINING AND EDUCATION SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-3.2	-0.3	1.7	6.1	6.9	3.6
Western Europe	-1.2	-0.2	1.7	4.5	3.3	2.3
Asia/Pacific	3.0	7.8	9.2	9.0	9.6	8.9
Latin America	-3.8	8.3	9.4	9.0	9.0	8.9
Central and Eastern Europe	14.5	13.4	15.5	18.6	15.8	15.8
Middle East/Africa	10.6	16.6	16.6	14.2	12.2	14.9
Worldwide	-1.2	1.4	3.4	6.4	6.4	4.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 22

PROPORTIONS OF WORLDWIDE IT TRAINING AND EDUCATION SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	47.0	46.1	45.3	44.6	44.4	44.6
Western Europe	35.3	35.3	34.8	34.2	33.6	32.6
Asia/Pacific	13.8	14.4	15.3	16.2	16.6	17.1
Latin America	1.5	1.5	1.6	1.6	1.7	1.7
Central and Eastern Europe	1.2	1.4	1.6	1.8	2.0	2.2
Middle East/Africa	1.1	1.2	1.4	1.6	1.7	1.8
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 23

IT TRAINING AND EDUCATION AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	1.2	1.1	1.1	1.0	1.0	1.0
Western Europe	0.9	0.9	0.8	0.8	0.8	0.8
Asia/Pacific	0.3	0.4	0.4	0.4	0.4	0.4
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	2.5	2.5	2.4	2.3	2.3	2.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

PACKAGED SOFTWARE

The worldwide application software market will recover to post 3% growth in 2003, a welcome but gradual recovery from the down/flat years of 2001 and 2002. This growth will accelerate in 2004 to 5%, and will reach 7% in 2005. The onset of the software "complexity crisis" (software having reached such a level of complexity that it has produced longer implementation periods and decision-making cycles, thereby reducing the rate of adoption and spending growth) will continue to depress growth rates for the immediate future. Relatively strong application growth this year will be found in messaging applications, conferencing applications, content management, HR software, collaborative applications, and translation/globalization software.

The worldwide application software market will recover to post 3% growth in 2003, a welcome but gradual recovery from the down/flat years of 2001 and 2002.

The application development and deployment (AD&D) market sector experienced an aggregate decline of 4.3% in 2002 following a similar decline in 2001. 2003 will show a return to modest positive growth, and the AD&D market sector will gather momentum throughout the forecast period as pent-up demand for investment in IT technology translates into spending on products for application development and deployment.

Application integration, particularly of legacy systems, will be a primary market driver and account for a significant portion of AD&D growth. The software complexity crisis will focus spending on technologies that simplify development and deployment, such as life-cycle and integration tools.

The system software market declined slightly in 2002 following the general climate of economic weakness and constrained IT spending. The outlook for growth in this market from 2003 to 2007 is positive but will be dampened by continuing economic weakness in the first half of 2003. On the other hand, the increased use of ratable revenue recognition over the life of a contract by some software vendors, with its effect of creating a deferred revenue pool from which to draw over time, has helped these vendors to stabilize revenue. Demand for security software has also buoyed the overall market.

Demand for security software has also buoyed the overall market.

Tables 24–35 illustrate forecasts for packaged software market spending from 2002 to 2007, with detail for the sectors of system infrastructure, application development and deployment, and applications.

TABLE 24

WORLDWIDE SYSTEM INFRASTRUCTURE SOFTWARE SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	19,708.6	20,176.4	21,019.4	22,421.1	24,263.9	26,227.1
Western Europe	14,726.7	15,517.5	16,562.1	17,756.3	19,020.1	20,484.5
Asia/Pacific	8,697.0	9,220.6	10,062.4	11,005.4	12,049.7	13,114.4
Latin America	1,113.5	1,182.0	1,283.7	1,386.9	1,495.2	1,590.9
Central and Eastern Europe	677.8	772.0	870.1	975.5	1,078.5	1,172.5
Middle East/Africa	682.3	758.4	879.0	1,011.4	1,139.2	1,265.8
Worldwide	45,606.0	47,626.9	50,676.6	54,556.7	59,046.6	63,855.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 25

GROWTH IN WORLDWIDE SYSTEM INFRASTRUCTURE SOFTWARE SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.4	4.2	6.7	8.2	8.1	6.8
Western Europe	5.4	6.7	7.2	7.1	7.7	7.2
Asia/Pacific	6.0	9.1	9.4	9.5	8.8	9.2
Latin America	6.2	8.6	8.0	7.8	6.4	7.7
Central and Eastern Europe	13.9	12.7	12.1	10.6	8.7	11.0
Middle East/Africa	11.1	15.9	15.1	12.6	11.1	13.7
Worldwide	4.4	6.4	7.7	8.2	8.1	7.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 26

PROPORTIONS OF WORLDWIDE SYSTEM INFRASTRUCTURE SOFTWARE SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	43.2	42.4	41.5	41.1	41.1	41.1
Western Europe	32.3	32.6	32.7	32.5	32.2	32.1
Asia/Pacific	19.1	19.4	19.9	20.2	20.4	20.5
Latin America	2.4	2.5	2.5	2.5	2.5	2.5
Central and Eastern Europe	1.5	1.6	1.7	1.8	1.8	1.8
Middle East/Africa	1.5	1.6	1.7	1.9	1.9	2.0
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 27

SYSTEM INFRASTRUCTURE SOFTWARE AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.3	2.3	2.3	2.3	2.3	2.4
Western Europe	1.7	1.8	1.8	1.8	1.8	1.9
Asia/Pacific	1.0	1.1	1.1	1.1	1.2	1.2
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	5.3	5.5	5.6	5.6	5.7	5.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 28

WORLDWIDE APPLICATION DEVELOPMENT AND DEPLOYMENT SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	19,741.8	20,208.4	21,049.6	22,450.8	24,287.8	26,230.9
Western Europe	11,919.0	12,240.0	12,858.4	13,739.2	14,881.2	16,133.4
Asia/Pacific	5,315.6	5,423.1	5,791.4	6,330.9	7,009.1	7,737.6
Latin America	1,072.0	1,128.6	1,234.5	1,352.0	1,471.2	1,573.1
Central and Eastern Europe	543.6	624.4	707.5	793.8	883.1	976.1
Middle East/Africa	549.0	604.6	692.1	797.4	907.2	1,016.6
Worldwide	39,141.0	40,229.0	42,333.6	45,464.1	49,439.5	53,667.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 29

GROWTH IN WORLDWIDE APPLICATION DEVELOPMENT AND DEPLOYMENT SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.4	4.2	6.7	8.2	8.0	6.7
Western Europe	2.7	5.1	6.8	8.3	8.4	7.1
Asia/Pacific	2.0	6.8	9.3	10.7	10.4	9.3
Latin America	5.3	9.4	9.5	8.8	6.9	8.7
Central and Eastern Europe	14.9	13.3	12.2	11.2	10.5	11.8
Middle East/Africa	10.1	14.5	15.2	13.8	12.1	13.9
Worldwide	2.8	5.2	7.4	8.7	8.6	7.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 30

PROPORTIONS OF WORLDWIDE APPLICATION DEVELOPMENT AND DEPLOYMENT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	50.4	50.2	49.7	49.4	49.1	48.9
Western Europe	30.5	30.4	30.4	30.2	30.1	30.1
Asia/Pacific	13.6	13.5	13.7	13.9	14.2	14.4
Latin America	2.7	2.8	2.9	3.0	3.0	2.9
Central and Eastern Europe	1.4	1.6	1.7	1.7	1.8	1.8
Middle East/Africa	1.4	1.5	1.6	1.8	1.8	1.9
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 31

APPLICATION DEVELOPMENT AND DEPLOYMENT AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.3	2.3	2.3	2.3	2.3	2.4
Western Europe	1.4	1.4	1.4	1.4	1.4	1.5
Asia/Pacific	0.6	0.6	0.6	0.7	0.7	0.7
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	4.5	4.6	4.7	4.7	4.8	4.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 32

WORLDWIDE APPLICATIONS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	46,174.0	47,246.1	49,399.4	52,571.1	56,084.7	58,784.4
Western Europe	26,486.9	26,926.5	28,053.6	29,888.1	32,037.9	34,138.3
Asia/Pacific	9,446.3	9,766.6	10,506.7	11,471.0	12,616.9	13,944.7
Latin America	1,089.9	1,139.2	1,254.9	1,391.3	1,513.9	1,618.6
Central and Eastern Europe	1,430.1	1,675.1	1,922.2	2,176.9	2,437.4	2,689.9
Middle East/Africa	1,434.1	1,558.4	1,730.5	1,931.6	2,117.7	2,400.4
Worldwide	86,061.3	88,311.9	92,867.3	99,430.0	106,808.4	113,576.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 33

GROWTH IN WORLDWIDE APPLICATIONS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.3	4.6	6.4	6.7	4.8	5.6
Western Europe	1.7	4.2	6.5	7.2	6.6	6.1
Asia/Pacific	3.4	7.6	9.2	10.0	10.5	9.3
Latin America	4.5	10.2	10.9	8.8	6.9	9.2
Central and Eastern Europe	17.1	14.8	13.2	12.0	10.4	12.6
Middle East/Africa	8.7	11.0	11.6	9.6	13.4	11.4
Worldwide	2.6	5.2	7.1	7.4	6.3	6.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 34

PROPORTIONS OF WORLDWIDE APPLICATIONS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	53.7	53.5	53.2	52.9	52.5	51.8
Western Europe	30.8	30.5	30.2	30.1	30.0	30.1
Asia/Pacific	11.0	11.1	11.3	11.5	11.8	12.3
Latin America	1.3	1.3	1.4	1.4	1.4	1.4
Central and Eastern Europe	1.7	1.9	2.1	2.2	2.3	2.4
Middle East/Africa	1.7	1.8	1.9	1.9	2.0	2.1
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 35

APPLICATIONS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	5.3	5.4	5.4	5.4	5.4	5.3
Western Europe	3.1	3.1	3.1	3.1	3.1	3.1
Asia/Pacific	1.1	1.1	1.2	1.2	1.2	1.3
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.2	0.2	0.2	0.2	0.2	0.2
Middle East/Africa	0.2	0.2	0.2	0.2	0.2	0.2
Worldwide	10.0	10.2	10.2	10.3	10.3	10.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

HARDWARE

The overall hardware market remains in the grip of fierce price competition, which has been partly responsible for a return to positive shipment growth in most sectors. The stabilizing economy and pent-up demand for infrastructure upgrades and replacements are also key factors in what should be the first positive year of growth (5%) for hardware spending in 2004. Growth will exceed 6% in 2005 as network equipment investment by telecom carriers accompanies a gradual receding of the telecom winter. Most hardware markets, particularly in emerging markets outside the United States, will return to positive growth trends in the coming years. Volume server growth in 2004 will approach double-digit levels, and the rapid adoption of converged handheld devices will propel that sector to worldwide growth of 52% next year. A return to normal seasonality is currently being observed in the server, storage, printer, and PC markets.

Volume server growth in 2004 will approach double-digit levels, and the rapid adoption of converged handheld devices will propel that sector to worldwide growth of 52% next year.

PERSONAL COMPUTERS

Recovery in the PC market is closely tied to economic recovery. Until profitability improves in the business sector, PC replacements will take place gradually, and large-scale updates or migration to mobile systems will be limited. However, pressure for PC replacements continues to build. Although we don't expect a sudden rush of PC replacements, growing costs to maintain older systems and improvements in the cost to own newer PCs will compel companies to upgrade.

Worldwide PC shipments of 33.2 million were up 7.6% year on year in the second quarter as aggressive pricing and strong portable adoption drove the market. The new quarter's results were ahead of projections for 4.1% growth due to the strong response to pricing initiatives in the United States and Europe as well as the limited impact of SARS on demand in Asia. This is the fourth consecutive quarter of positive growth and represents the highest growth rate since the end of 2000.

Worldwide PC shipments of 33.2 million were up 7.6% year on year in the second quarter as aggressive pricing and strong portable adoption drove the market.

The long-range forecast calls for worldwide growth of 2% next year, reaching 4% in 2005. With most of the growth to be found in emerging markets, the United States will see a temporary recovery to positive PC spending growth next year before another period of decline follows the upgrade/replacement cycle.

SERVERS

The server systems market declined 3.6% in the first quarter of 2003 to $10.5 billion in terms of factory revenue compared with the same quarter a year ago. The sequential quarterly decline was less than the 5% year-over-year decline that was shown in 4Q02, indicating a continued trend toward stabilization in overall market spending. The slight decline was in line with IDC expectations for 1Q03 factory revenue.

The server systems market declined 3.6% in the first quarter of 2003 to $10.5 billion in terms of factory revenue compared with the same quarter a year ago.

Overall, the server market is expected to see a total decline of 4% in terms of customer spending this year, largely due to declines in Europe (13%) and Japan (8%). The United States will see a return to positive growth for the overall year (2%) as the market returns to normal seasonality in the second half of 2003, marking significant stability after the major declines of 2001 and 2002. In 2004, the worldwide market will recover to overall growth of 5%, with volume server growth reaching 9%.

STORAGE

Worldwide disk storage systems factory revenue was $4.8 billion in the first quarter of 2003, down 1% compared with the first quarter of 2002. This slight year-over-year decline was less than the 8% year-over-year decline that was shown in the fourth quarter of 2002, indicating a continued trend toward stabilization in overall market spending. The overall market was buoyed by strong sales in the open storage area network (SAN) market, which grew nearly 14% year over year in terms of factory revenue. Meanwhile, overall storage capacity continues to outpace revenue, growing nearly 49% year over year to 175.6 petabytes shipped during the first quarter.

Buyers' efforts to constrain capital purchases dominated the forces on the storage market in 2002. This marked the second year of a buyer's market, which IDC forecasts will continue into 2003. The era of increasing supplier value-adds as a means to grow market revenue seems to be in the distant past. Users not only continued to drive price concessions but, in many cases, have also moved from enterprise-class to modular storage products with a make-do-with-less attitude.

Buyers' efforts to constrain capital purchases dominated the forces on the storage market in 2002.

As a result, the worldwide market for disk systems will see a third year of decline in 2003, though this decline will be less severe at around 2%. In 2004, positive growth will return (1%), with 2005 expected to see 4% growth. The market for tape automation (library) storage will return to positive growth of approximately 1% this year.

PRINTERS

The overall single-function printer market is expected to decline slightly throughout the forecast period as cannibalization by MFPs escalates, especially in the inkjet space. The 2002–2007 unit shipment CAGR is projected to be slightly negative.

The growth of MFPs, on the other hand, will propel overall market growth to 5% this year, receding slightly to 4% next year. Although the U.S. market is expected to control the highest percentage of activity in the worldwide MFP market, the greatest growth opportunities are presented in Western Europe and other rest of the world (ROW) regions. These geographical areas are less established in the MFP market when compared with the United States, so IDC projects that growth rates in these regions will surpass the U.S. growth rate.

Although the U.S. market is expected to control the highest percentage of activity in the worldwide MFP market, the greatest growth opportunities are presented in Western Europe and other ROW regions.

Inkjet MFPs currently control share and should continue to control share, the highest unit share of worldwide MFP activity throughout the forecast period. However, monochrome laser offers the highest value shipment returns. Color laser, although a small percentage of the worldwide MFP opportunity, does exhibit the highest unit and value CAGRs in this market.

HANDHELD DEVICES

Given its infancy, the domestic converged handheld device market is poised for steady growth throughout the forecast period. Devices that draw on a mobile phone design heritage will grab the majority of the volume opportunity through 2007, given carrier subsidies and consumer positioning. Devices that draw on a handheld device design heritage will tie closely to the state of enterprise information technology spending and will appeal to a niche market opportunity.

In 2003, we expect shipments in the worldwide converged handheld device market to enjoy marked growth as major mobile phone manufacturers bring new converged handheld devices to market. In 2004 and beyond, the market will enjoy strong, sustained growth as form factors continue to improve, along with increased model variety and decreasing price points.

In 2003, we expect shipments in the worldwide converged handheld device market to enjoy marked growth as major mobile phone manufacturers bring new converged handheld devices to market.

On the other hand, we expect shipments in the standalone handheld device market to remain flat as enterprise and consumer information technology spending priorities and competition from alternative form factors impact demand. In 2004 and beyond, limited market growth will return — economic improvement will lead to increased enterprise and consumer spending on handheld devices.

The platform wars will continue. Despite growth in the number of Windows-, Linux-, and proprietary platform–powered handheld devices, the Palm operating system will maintain a sizable market share lead in handheld device shipments through 2005. In the later forecast years, through 2007, a range of inexpensive devices will help Windows CE and Pocket PC compete for leadership.

NETWORK EQUIPMENT

The depth of the telecommunications downturn continues to impact near-term prospects for network equipment spending. An expected NSP capex decline during 2003 will continue to depress network equipment spending.

IDC has revised downward its forecasts in almost all market segments, including optical networks, routers, ATM switches, new world voice, broadband, and network management. All segments of the network buildout continued to be affected by the slowdown in infrastructure spending by NSPs. We remain optimistic about longer-term opportunities in the NSP infrastructure arena, especially from 2005 to 2007. Widespread broadband adoption, availability of enhanced IP services, deployment of wireless data networks, and migration of the voice network from TDM to packet architecture will drive demand for many equipment types. With the longer-term recovery in NSP capex, network equipment growth rates will recover significantly from 2005.

With the longer-term recovery in NSP capex, network equipment growth rates will recover significantly from 2005.

Tables 36–99 illustrate forecasts for hardware 2002–2007 market spending, with detail for the sectors of servers, PCs, workstations, storage, printers and MFPs, handheld devices, and network equipment.

TABLE 36

WORLDWIDE HIGH-END ENTERPRISE SERVERS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	4,672.0	3,795.0	3,692.6	3,834.0	4,052.3	4,121.8
Western Europe	3,949.0	3,407.3	3,396.5	3,230.3	3,062.4	2,989.4
Asia/Pacific	4,077.4	4,102.5	3,864.7	3,616.8	3,512.2	3,216.4
Latin America	438.8	355.1	364.4	378.6	389.0	401.7
Central and Eastern Europe	100.1	51.7	55.0	62.1	73.5	99.8
Middle East/Africa	125.2	99.3	103.0	105.7	107.1	117.1
Worldwide	13,362.5	11,811.0	11,476.3	11,227.4	11,196.4	10,946.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 37

GROWTH IN WORLDWIDE HIGH-END ENTERPRISE SERVERS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-18.8	-2.7	3.8	5.7	1.7	2.1
Western Europe	-13.7	-0.3	-4.9	-5.2	-2.4	-3.2
Asia/Pacific	0.6	-5.8	-6.4	-2.9	-8.4	-5.9
Latin America	-19.1	2.6	3.9	2.8	3.3	3.1
Central and Eastern Europe	-48.4	6.5	12.8	18.4	35.8	17.9
Middle East/Africa	-20.7	3.7	2.6	1.3	9.4	4.2
Worldwide	-11.6	-2.8	-2.2	-0.3	-2.2	-1.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 38

PROPORTIONS OF WORLDWIDE HIGH-END ENTERPRISE SERVERS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	35.0	32.1	32.2	34.1	36.2	37.7
Western Europe	29.6	28.8	29.6	28.8	27.4	27.3
Asia/Pacific	30.5	34.7	33.7	32.2	31.4	29.4
Latin America	3.3	3.0	3.2	3.4	3.5	3.7
Central and Eastern Europe	0.7	0.4	0.5	0.6	0.7	0.9
Middle East/Africa	0.9	0.8	0.9	0.9	1.0	1.1
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 39

HIGH-END ENTERPRISE SERVERS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.5	0.4	0.4	0.4	0.4	0.4
Western Europe	0.5	0.4	0.4	0.3	0.3	0.3
Asia/Pacific	0.5	0.5	0.4	0.4	0.3	0.3
Latin America	0.1	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	1.5	1.4	1.3	1.2	1.1	1.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 40

WORLDWIDE MIDRANGE ENTERPRISE SERVERS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	5,218.2	5,294.7	5,438.4	5,596.1	5,637.7	6,075.4
Western Europe	4,091.2	3,408.9	3,455.6	3,792.4	3,808.4	3,973.8
Asia/Pacific	4,547.4	3,861.9	4,177.5	4,253.6	4,250.2	4,456.1
Latin America	366.4	325.0	345.7	365.6	382.4	394.6
Central and Eastern Europe	277.7	300.6	306.1	333.8	357.9	375.5
Middle East/Africa	267.2	263.2	299.3	324.4	340.7	367.3
Worldwide	14,768.1	13,454.2	14,022.5	14,665.9	14,777.3	15,642.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 41

GROWTH IN WORLDWIDE MIDRANGE ENTERPRISE SERVERS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	1.5	2.7	2.9	0.7	7.8	3.5
Western Europe	-16.7	1.4	9.7	0.4	4.3	3.9
Asia/Pacific	-15.1	8.2	1.8	-0.1	4.8	3.6
Latin America	-11.3	6.4	5.8	4.6	3.2	5.0
Central and Eastern Europe	8.2	1.8	9.1	7.2	4.9	5.7
Middle East/Africa	-1.5	13.7	8.4	5.0	7.8	8.7
Worldwide	-8.9	4.2	4.6	0.8	5.9	3.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 42

PROPORTIONS OF WORLDWIDE MIDRANGE ENTERPRISE SERVERS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	35.3	39.4	38.8	38.2	38.2	38.8
Western Europe	27.7	25.3	24.6	25.9	25.8	25.4
Asia/Pacific	30.8	28.7	29.8	29.0	28.8	28.5
Latin America	2.5	2.4	2.5	2.5	2.6	2.5
Central and Eastern Europe	1.9	2.2	2.2	2.3	2.4	2.4
Middle East/Africa	1.8	2.0	2.1	2.2	2.3	2.3
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 43

MIDRANGE ENTERPRISE SERVERS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.6	0.6	0.6	0.6	0.5	0.6
Western Europe	0.5	0.4	0.4	0.4	0.4	0.4
Asia/Pacific	0.5	0.4	0.5	0.4	0.4	0.4
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	1.7	1.5	1.5	1.5	1.4	1.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 44

WORLDWIDE VOLUME SERVERS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	9,041.4	10,228.1	11,241.3	11,766.6	12,619.2	12,946.7
Western Europe	5,312.2	4,743.5	5,020.0	5,515.7	6,121.1	6,277.7
Asia/Pacific	4,777.7	4,965.8	5,436.3	5,937.1	6,512.1	7,181.5
Latin America	501.7	515.2	552.0	573.3	587.3	606.2
Central and Eastern Europe	765.9	815.1	922.1	1,027.2	1,134.8	1,236.8
Middle East/Africa	657.5	713.6	837.5	928.4	1,035.3	1,134.3
Worldwide	21,056.4	21,981.3	24,009.1	25,748.3	28,009.8	29,383.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 45

GROWTH IN WORLDWIDE VOLUME SERVERS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	13.1	9.9	4.7	7.2	2.6	6.1
Western Europe	-10.7	5.8	9.9	11.0	2.6	7.3
Asia/Pacific	3.9	9.5	9.2	9.7	10.3	9.7
Latin America	2.7	7.1	3.9	2.4	3.2	4.1
Central and Eastern Europe	6.4	13.1	11.4	10.5	9.0	11.0
Middle East/Africa	8.5	17.4	10.9	11.5	9.6	12.3
Worldwide	4.4	9.2	7.2	8.8	4.9	7.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 46

PROPORTIONS OF WORLDWIDE VOLUME SERVERS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	42.9	46.5	46.8	45.7	45.1	44.1
Western Europe	25.2	21.6	20.9	21.4	21.9	21.4
Asia/Pacific	22.7	22.6	22.6	23.1	23.2	24.4
Latin America	2.4	2.3	2.3	2.2	2.1	2.1
Central and Eastern Europe	3.6	3.7	3.8	4.0	4.1	4.2
Middle East/Africa	3.1	3.2	3.5	3.6	3.7	3.9
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 47

VOLUME SERVERS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	1.0	1.2	1.2	1.2	1.2	1.2
Western Europe	0.6	0.5	0.6	0.6	0.6	0.6
Asia/Pacific	0.6	0.6	0.6	0.6	0.6	0.7
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	2.4	2.5	2.6	2.7	2.7	2.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 48

WORLDWIDE TOTAL SERVERS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	18,931.5	19,317.8	20,372.2	21,196.6	22,309.2	23,144.0
Western Europe	13,352.4	11,559.7	11,872.1	12,538.4	12,991.9	13,240.9
Asia/Pacific	13,402.5	12,930.2	13,478.4	13,807.5	14,274.5	14,853.9
Latin America	1,306.9	1,195.3	1,262.1	1,317.4	1,358.7	1,402.6
Central and Eastern Europe	1,143.7	1,167.4	1,283.3	1,423.1	1,566.2	1,712.1
Middle East/Africa	1,049.9	1,076.1	1,239.8	1,358.5	1,483.1	1,618.7
Worldwide	49,186.9	47,246.5	49,507.9	51,641.5	53,983.5	55,972.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 49

GROWTH IN WORLDWIDE TOTAL SERVERS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.0	5.5	4.0	5.2	3.7	4.6
Western Europe	-13.4	2.7	5.6	3.6	1.9	3.5
Asia/Pacific	-3.5	4.2	2.4	3.4	4.1	3.5
Latin America	-8.5	5.6	4.4	3.1	3.2	4.1
Central and Eastern Europe	2.1	9.9	10.9	10.1	9.3	10.0
Middle East/Africa	2.5	15.2	9.6	9.2	9.1	10.7
Worldwide	-3.9	4.8	4.3	4.5	3.7	4.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 50

PROPORTIONS OF WORLDWIDE TOTAL SERVERS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	38.5	40.9	41.1	41.0	41.3	41.3
Western Europe	27.1	24.5	24.0	24.3	24.1	23.7
Asia/Pacific	27.2	27.4	27.2	26.7	26.4	26.5
Latin America	2.7	2.5	2.5	2.6	2.5	2.5
Central and Eastern Europe	2.3	2.5	2.6	2.8	2.9	3.1
Middle East/Africa	2.1	2.3	2.5	2.6	2.7	2.9
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 51

TOTAL SERVERS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.2	2.2	2.2	2.2	2.2	2.1
Western Europe	1.5	1.3	1.3	1.3	1.3	1.2
Asia/Pacific	1.6	1.5	1.5	1.4	1.4	1.3
Latin America	0.2	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.2	0.2
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	5.7	5.4	5.4	5.3	5.2	5.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 52

WORLDWIDE PERSONAL COMPUTERS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	54,450.0	49,228.2	49,757.3	49,981.3	48,014.9	45,449.9
Western Europe	42,524.0	40,304.3	39,278.2	40,027.9	40,191.6	41,703.5
Asia/Pacific	41,859.9	41,468.7	43,915.7	47,611.8	51,531.5	55,302.3
Latin America	7,349.6	7,080.4	7,479.7	7,865.6	8,171.2	8,437.0
Central and Eastern Europe	4,511.7	4,836.5	5,436.5	6,055.5	6,730.1	7,398.2
Middle East/Africa	3,785.9	4,096.1	4,583.5	5,111.7	5,673.2	6,258.4
Worldwide	154,481.0	147,014.1	150,450.8	156,653.7	160,312.6	164,549.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 53

GROWTH IN WORLDWIDE PERSONAL COMPUTERS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-9.6	1.1	0.5	-3.9	-5.3	-2.0
Western Europe	-5.2	-2.5	1.9	0.4	3.8	0.9
Asia/Pacific	-0.9	5.9	8.4	8.2	7.3	7.5
Latin America	-3.7	5.6	5.2	3.9	3.3	4.5
Central and Eastern Europe	7.2	12.4	11.4	11.1	9.9	11.2
Middle East/Africa	8.2	11.9	11.5	11.0	10.3	11.2
Worldwide	-4.8	2.3	4.1	2.3	2.6	2.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

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TABLE 54

PROPORTIONS OF WORLDWIDE PERSONAL COMPUTERS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	35.2	33.5	33.1	31.9	30.0	27.6
Western Europe	27.5	27.4	26.1	25.6	25.1	25.3
Asia/Pacific	27.1	28.2	29.2	30.4	32.1	33.6
Latin America	4.8	4.8	5.0	5.0	5.1	5.1
Central and Eastern Europe	2.9	3.3	3.6	3.9	4.2	4.5
Middle East/Africa	2.5	2.8	3.0	3.3	3.5	3.8
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 55

PERSONAL COMPUTERS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	6.3	5.7	5.5	5.2	4.6	4.1
Western Europe	4.9	4.6	4.3	4.1	3.9	3.8
Asia/Pacific	4.8	4.8	4.8	4.9	5.0	5.0
Latin America	0.9	0.8	0.8	0.8	0.8	0.8
Central and Eastern Europe	0.5	0.6	0.6	0.6	0.7	0.7
Middle East/Africa	0.4	0.5	0.5	0.5	0.5	0.6
Worldwide	17.9	16.9	16.5	16.2	15.5	14.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 56

WORLDWIDE TRADITIONAL WORKSTATIONS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	1,062.9	606.8	389.7	272.0	205.1	164.1
Western Europe	661.5	569.9	457.2	380.8	322.1	280.6
Asia/Pacific	420.3	315.2	272.8	234.1	208.1	188.6
Latin America	125.2	105.8	96.5	92.7	77.3	88.5
Central and Eastern Europe	23.6	21.0	18.4	16.8	16.8	14.9
Middle East/Africa	61.2	56.4	54.1	51.8	48.8	43.8
Worldwide	2,354.5	1,675.2	1,288.7	1,048.2	878.2	780.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 57

GROWTH IN WORLDWIDE TRADITIONAL WORKSTATIONS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-42.9	-35.8	-30.2	-24.6	-20.0	-27.9
Western Europe	-13.8	-19.8	-16.7	-15.4	-12.9	-16.2
Asia/Pacific	-25.0	-13.4	-14.2	-11.1	-9.4	-12.0
Latin America	-15.4	-8.8	-4.0	-16.6	14.5	-4.4
Central and Eastern Europe	-10.8	-12.7	-8.3	-0.3	-11.5	-8.3
Middle East/Africa	-7.8	-4.0	-4.4	-5.7	-10.2	-6.1
Worldwide	-28.9	-23.1	-18.7	-16.2	-11.1	-17.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 58

PROPORTIONS OF WORLDWIDE TRADITIONAL WORKSTATIONS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	45.1	36.2	30.2	26.0	23.4	21.0
Western Europe	28.1	34.0	35.5	36.3	36.7	36.0
Asia/Pacific	17.9	18.8	21.2	22.3	23.7	24.2
Latin America	5.3	6.3	7.5	8.8	8.8	11.3
Central and Eastern Europe	1.0	1.3	1.4	1.6	1.9	1.9
Middle East/Africa	2.6	3.4	4.2	4.9	5.6	5.6
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 59

TRADITIONAL WORKSTATIONS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.1	0.1	0.0	0.0	0.0	0.0
Western Europe	0.1	0.1	0.1	0.0	0.0	0.0
Asia/Pacific	0.0	0.0	0.0	0.0	0.0	0.0
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	0.3	0.2	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 60

WORLDWIDE TOTAL CLIENTS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	55,512.8	49,835.0	50,147.0	50,253.3	48,220.1	45,614.0
Western Europe	43,185.4	40,874.2	39,735.3	40,408.6	40,513.8	41,984.1
Asia/Pacific	42,280.2	41,783.9	44,188.5	47,845.9	51,739.6	55,490.9
Latin America	7,474.8	7,186.2	7,576.2	7,958.2	8,248.5	8,525.5
Central and Eastern Europe	4,535.2	4,857.5	5,454.9	6,072.4	6,746.9	7,413.1
Middle East/Africa	3,847.1	4,152.5	4,637.6	5,163.5	5,722.0	6,302.3
Worldwide	156,835.6	148,689.3	151,739.5	157,701.9	161,190.8	165,329.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 61

GROWTH IN WORLDWIDE TOTAL CLIENTS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-10.2	0.6	0.2	-4.0	-5.4	-2.2
Western Europe	-5.4	-2.8	1.7	0.3	3.6	0.7
Asia/Pacific	-1.2	5.8	8.3	8.1	7.3	7.4
Latin America	-3.9	5.4	5.0	3.6	3.4	4.4
Central and Eastern Europe	7.1	12.3	11.3	11.1	9.9	11.1
Middle East/Africa	7.9	11.7	11.3	10.8	10.1	11.0
Worldwide	-5.2	2.1	3.9	2.2	2.6	2.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 62

PROPORTIONS OF WORLDWIDE TOTAL CLIENTS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	35.4	33.5	33.0	31.9	29.9	27.6
Western Europe	27.5	27.5	26.2	25.6	25.1	25.4
Asia/Pacific	27.0	28.1	29.1	30.3	32.1	33.6
Latin America	4.8	4.8	5.0	5.0	5.1	5.2
Central and Eastern Europe	2.9	3.3	3.6	3.9	4.2	4.5
Middle East/Africa	2.5	2.8	3.1	3.3	3.5	3.8
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 63

TOTAL CLIENTS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	6.4	5.7	5.5	5.2	4.7	4.1
Western Europe	5.0	4.7	4.4	4.2	3.9	3.8
Asia/Pacific	4.9	4.8	4.9	4.9	5.0	5.0
Latin America	0.9	0.8	0.8	0.8	0.8	0.8
Central and Eastern Europe	0.5	0.6	0.6	0.6	0.7	0.7
Middle East/Africa	0.4	0.5	0.5	0.5	0.6	0.6
Worldwide	18.2	17.1	16.7	16.3	15.6	15.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 64

WORLDWIDE SYSTEMS TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	74,444.4	69,152.8	70,519.2	71,450.0	70,529.2	68,758.0
Western Europe	56,537.8	52,433.9	51,607.4	52,947.0	53,505.7	55,225.1
Asia/Pacific	55,682.8	54,714.0	57,666.9	61,653.3	66,014.0	70,344.8
Latin America	8,781.7	8,381.6	8,838.3	9,275.6	9,607.2	9,928.0
Central and Eastern Europe	5,678.9	6,024.9	6,738.1	7,495.5	8,313.1	9,125.2
Middle East/Africa	4,896.9	5,228.6	5,877.5	6,522.0	7,205.1	7,921.0
Worldwide	206,022.5	195,935.8	201,247.4	209,343.4	215,174.3	221,302.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 65

GROWTH IN WORLDWIDE SYSTEMS TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-7.1	2.0	1.3	-1.3	-2.5	-0.1
Western Europe	-7.3	-1.6	2.6	1.1	3.2	1.3
Asia/Pacific	-1.7	5.4	6.9	7.1	6.6	6.5
Latin America	-4.6	5.4	4.9	3.6	3.3	4.3
Central and Eastern Europe	6.1	11.8	11.2	10.9	9.8	10.9
Middle East/Africa	6.8	12.4	11.0	10.5	9.9	10.9
Worldwide	-4.9	2.7	4.0	2.8	2.8	3.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 66

PROPORTIONS OF WORLDWIDE SYSTEMS TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	36.1	35.3	35.0	34.1	32.8	31.1
Western Europe	27.4	26.8	25.6	25.3	24.9	25.0
Asia/Pacific	27.0	27.9	28.7	29.5	30.7	31.8
Latin America	4.3	4.3	4.4	4.4	4.5	4.5
Central and Eastern Europe	2.8	3.1	3.3	3.6	3.9	4.1
Middle East/Africa	2.4	2.7	2.9	3.1	3.3	3.6
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 67

SYSTEMS TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	8.6	8.0	7.7	7.4	6.8	6.2
Western Europe	6.6	6.0	5.7	5.5	5.2	5.0
Asia/Pacific	6.5	6.3	6.3	6.4	6.4	6.4
Latin America	1.0	1.0	1.0	1.0	0.9	0.9
Central and Eastern Europe	0.7	0.7	0.7	0.8	0.8	0.8
Middle East/Africa	0.6	0.6	0.6	0.7	0.7	0.7
Worldwide	23.9	22.6	22.1	21.6	20.8	20.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 68

WORLDWIDE DISK SYSTEMS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	8,625.7	8,493.3	8,524.8	8,748.5	9,028.7	9,270.2
Western Europe	6,467.0	6,227.6	6,148.7	6,333.6	6,512.9	6,682.3
Asia/Pacific	5,324.0	5,086.3	5,259.6	5,484.0	5,705.0	5,856.8
Latin America	608.4	656.2	738.9	827.0	917.2	1,010.7
Central and Eastern Europe	279.8	307.1	359.0	413.3	473.7	528.3
Middle East/Africa	275.4	306.9	343.8	391.1	455.7	516.8
Worldwide	21,580.4	21,077.4	21,374.7	22,197.6	23,093.2	23,865.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 69

GROWTH IN WORLDWIDE DISK SYSTEMS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-1.5	0.4	2.6	3.2	2.7	2.2
Western Europe	-3.7	-1.3	3.0	2.8	2.6	1.8
Asia/Pacific	-4.5	3.4	4.3	4.0	2.7	3.6
Latin America	7.9	12.6	11.9	10.9	10.2	11.4
Central and Eastern Europe	9.7	16.9	15.1	14.6	11.5	14.5
Middle East/Africa	11.4	12.0	13.8	16.5	13.4	13.9
Worldwide	-2.3	1.4	3.8	4.0	3.3	3.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 70

PROPORTIONS OF WORLDWIDE DISK SYSTEMS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	40.0	40.3	39.9	39.4	39.1	38.8
Western Europe	30.0	29.5	28.8	28.5	28.2	28.0
Asia/Pacific	24.7	24.1	24.6	24.7	24.7	24.5
Latin America	2.8	3.1	3.5	3.7	4.0	4.2
Central and Eastern Europe	1.3	1.5	1.7	1.9	2.1	2.2
Middle East/Africa	1.3	1.5	1.6	1.8	2.0	2.2
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 71

DISK SYSTEMS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	1.0	1.0	0.9	0.9	0.9	0.8
Western Europe	0.7	0.7	0.7	0.7	0.6	0.6
Asia/Pacific	0.6	0.6	0.6	0.6	0.6	0.5
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	2.5	2.4	2.3	2.3	2.2	2.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 72

WORLDWIDE TAPE AUTOMATION SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	1,341.4	1,373.1	1,420.7	1,488.4	1,579.0	1,691.7
Western Europe	478.0	427.4	425.8	429.8	433.5	443.2
Asia/Pacific	756.2	778.0	812.9	854.0	890.5	926.1
Latin America	181.6	185.8	200.5	215.5	229.8	244.2
Central and Eastern Europe	82.8	85.7	87.0	92.8	97.2	100.6
Middle East/Africa	89.2	97.8	99.8	109.6	116.2	129.8
Worldwide	2,929.3	2,947.9	3,046.8	3,190.0	3,346.2	3,535.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 73

GROWTH IN WORLDWIDE TAPE AUTOMATION SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.4	3.5	4.8	6.1	7.1	5.4
Western Europe	-10.6	-0.4	0.9	0.9	2.2	0.9
Asia/Pacific	2.9	4.5	5.1	4.3	4.0	4.5
Latin America	2.3	7.9	7.5	6.6	6.3	7.1
Central and Eastern Europe	3.5	1.5	6.6	4.8	3.4	4.1
Middle East/Africa	9.6	2.1	9.7	6.0	11.7	7.3
Worldwide	0.6	3.4	4.7	4.9	5.7	4.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 74

PROPORTIONS OF WORLDWIDE TAPE AUTOMATION SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	45.8	46.6	46.6	46.7	47.2	47.8
Western Europe	16.3	14.5	14.0	13.5	13.0	12.5
Asia/Pacific	25.8	26.4	26.7	26.8	26.6	26.2
Latin America	6.2	6.3	6.6	6.8	6.9	6.9
Central and Eastern Europe	2.8	2.9	2.9	2.9	2.9	2.8
Middle East/Africa	3.0	3.3	3.3	3.4	3.5	3.7
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 75

TAPE AUTOMATION AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.2	0.2	0.2	0.2	0.2	0.2
Western Europe	0.1	0.0	0.0	0.0	0.0	0.0
Asia/Pacific	0.1	0.1	0.1	0.1	0.1	0.1
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 76

WORLDWIDE STORAGE TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	9,967.2	9,866.4	9,945.5	10,236.9	10,607.7	10,961.9
Western Europe	6,945.0	6,655.0	6,574.5	6,763.4	6,946.4	7,125.5
Asia/Pacific	6,080.2	5,864.3	6,072.5	6,338.1	6,595.6	6,782.8
Latin America	790.0	842.0	939.4	1,042.5	1,147.0	1,254.8
Central and Eastern Europe	362.6	392.8	446.0	506.1	570.9	628.9
Middle East/Africa	364.6	404.7	443.6	500.6	571.9	646.6
Worldwide	24,509.6	24,025.3	24,421.5	25,387.6	26,439.5	27,400.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 77

GROWTH IN WORLDWIDE STORAGE TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-1.0	0.8	2.9	3.6	3.3	2.7
Western Europe	-4.2	-1.2	2.9	2.7	2.6	1.7
Asia/Pacific	-3.6	3.5	4.4	4.1	2.8	3.7
Latin America	6.6	11.6	11.0	10.0	9.4	10.5
Central and Eastern Europe	8.3	13.6	13.5	12.8	10.2	12.5
Middle East/Africa	11.0	9.6	12.9	14.2	13.1	12.4
Worldwide	-2.0	1.6	4.0	4.1	3.6	3.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 78

PROPORTIONS OF WORLDWIDE STORAGE TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	40.7	41.1	40.7	40.3	40.1	40.0
Western Europe	28.3	27.7	26.9	26.6	26.3	26.0
Asia/Pacific	24.8	24.4	24.9	25.0	24.9	24.8
Latin America	3.2	3.5	3.8	4.1	4.3	4.6
Central and Eastern Europe	1.5	1.6	1.8	2.0	2.2	2.3
Middle East/Africa	1.5	1.7	1.8	2.0	2.2	2.4
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 79

STORAGE TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	1.2	1.1	1.1	1.1	1.0	1.0
Western Europe	0.8	0.8	0.7	0.7	0.7	0.6
Asia/Pacific	0.7	0.7	0.7	0.7	0.6	0.6
Latin America	0.1	0.1	0.1	0.1	0.1	0.1
Central and Eastern Europe	0.0	0.0	0.0	0.1	0.1	0.1
Middle East/Africa	0.0	0.0	0.0	0.1	0.1	0.1
Worldwide	2.8	2.8	2.7	2.6	2.6	2.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 80

WORLDWIDE PRINTERS AND MFPS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	17,971.6	17,940.3	17,721.8	17,490.4	17,529.0	17,476.1
Western Europe	11,500.3	12,695.5	13,957.9	14,996.2	15,956.1	16,532.3
Asia/Pacific	8,247.9	8,937.8	9,431.1	10,018.3	10,491.0	11,064.7
Latin America	1,171.4	1,208.6	1,321.2	1,450.5	1,553.8	1,686.6
Central and Eastern Europe	1,280.4	1,359.3	1,459.9	1,551.7	1,609.5	1,671.6
Middle East/Africa	918.0	985.5	1,056.7	1,140.4	1,217.8	1,286.7
Worldwide	41,089.6	43,127.0	44,948.6	46,647.5	48,357.0	49,718.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 81

GROWTH IN WORLDWIDE PRINTERS AND MFPS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-0.2	-1.2	-1.3	0.2	-0.3	-0.7
Western Europe	10.4	9.9	7.4	6.4	3.6	6.8
Asia/Pacific	8.4	5.5	6.2	4.7	5.5	5.5
Latin America	3.2	9.3	9.8	7.1	8.6	8.7
Central and Eastern Europe	6.2	7.4	6.3	3.7	3.9	5.3
Middle East/Africa	7.4	7.2	7.9	6.8	5.7	6.9
Worldwide	5.0	4.2	3.8	3.7	2.8	3.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 82

PROPORTIONS OF WORLDWIDE PRINTERS AND MFPS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	43.7	41.6	39.4	37.5	36.2	35.2
Western Europe	28.0	29.4	31.1	32.1	33.0	33.3
Asia/Pacific	20.1	20.7	21.0	21.5	21.7	22.3
Latin America	2.9	2.8	2.9	3.1	3.2	3.4
Central and Eastern Europe	3.1	3.2	3.2	3.3	3.3	3.4
Middle East/Africa	2.2	2.3	2.4	2.4	2.5	2.6
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 83

PRINTERS AND MFPS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.1	2.1	1.9	1.8	1.7	1.6
Western Europe	1.3	1.5	1.5	1.5	1.5	1.5
Asia/Pacific	1.0	1.0	1.0	1.0	1.0	1.0
Latin America	0.1	0.1	0.1	0.1	0.2	0.2
Central and Eastern Europe	0.1	0.2	0.2	0.2	0.2	0.2
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	4.8	5.0	4.9	4.8	4.7	4.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 84

WORLDWIDE SMART HANDHELD DEVICES SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	2,990.5	4,135.6	5,247.9	7,124.0	9,475.5	12,427.3
Western Europe	2,554.0	4,580.1	8,560.0	12,405.6	15,492.5	17,705.7
Asia/Pacific	1,549.7	1,867.9	2,448.2	3,090.9	3,854.7	4,810.6
Latin America	288.2	248.0	288.3	311.5	349.8	384.7
Central and Eastern Europe	48.3	60.1	74.2	83.6	94.0	106.4
Middle East/Africa	46.8	61.0	76.0	87.7	100.9	111.2
Worldwide	7,477.5	10,952.7	16,694.7	23,103.4	29,367.3	35,546.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 85

GROWTH IN WORLDWIDE SMART HANDHELD DEVICES SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	38.3	26.9	35.7	33.0	31.2	31.7
Western Europe	79.3	86.9	44.9	24.9	14.3	40.2
Asia/Pacific	20.5	31.1	26.3	24.7	24.8	26.7
Latin America	-14.0	16.2	8.1	12.3	10.0	11.6
Central and Eastern Europe	24.4	23.5	12.6	12.5	13.2	15.3
Middle East/Africa	30.5	24.5	15.5	15.0	10.2	16.2
Worldwide	46.5	52.4	38.4	27.1	21.0	34.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 86

PROPORTIONS OF WORLDWIDE SMART HANDHELD DEVICES SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	40.0	37.8	31.4	30.8	32.3	35.0
Western Europe	34.2	41.8	51.3	53.7	52.8	49.8
Asia/Pacific	20.7	17.1	14.7	13.4	13.1	13.5
Latin America	3.9	2.3	1.7	1.3	1.2	1.1
Central and Eastern Europe	0.6	0.5	0.4	0.4	0.3	0.3
Middle East/Africa	0.6	0.6	0.5	0.4	0.3	0.3
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 87

SMART HANDHELD DEVICES AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.3	0.5	0.6	0.7	0.9	1.1
Western Europe	0.3	0.5	0.9	1.3	1.5	1.6
Asia/Pacific	0.2	0.2	0.3	0.3	0.4	0.4
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.0	0.0	0.0	0.0	0.0	0.0
Middle East/Africa	0.0	0.0	0.0	0.0	0.0	0.0
Worldwide	0.9	1.3	1.8	2.4	2.8	3.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 88

WORLDWIDE OTHER ADD-ONS SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	4,768.3	4,106.8	3,922.3	3,746.7	3,945.9	3,683.3
Western Europe	3,168.5	2,896.0	2,739.6	2,703.3	2,621.4	2,625.8
Asia/Pacific	3,490.1	3,166.1	3,449.7	3,774.6	4,100.7	4,479.0
Latin America	147.0	152.5	183.7	212.4	243.5	273.4
Central and Eastern Europe	541.4	604.0	669.1	743.2	831.5	915.7
Middle East/Africa	598.1	650.5	764.4	881.1	991.3	1,112.0
Worldwide	12,713.4	11,576.0	11,728.9	12,061.3	12,734.5	13,089.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 89

GROWTH IN WORLDWIDE OTHER ADD-ONS SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-13.9	-4.5	-4.5	5.3	-6.7	-2.7
Western Europe	-8.6	-5.4	-1.3	-3.0	0.2	-2.4
Asia/Pacific	-9.3	9.0	9.4	8.6	9.2	9.1
Latin America	3.8	20.5	15.6	14.6	12.3	15.7
Central and Eastern Europe	11.6	10.8	11.1	11.9	10.1	11.0
Middle East/Africa	8.8	17.5	15.3	12.5	12.2	14.3
Worldwide	-8.9	1.3	2.8	5.6	2.8	3.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 90

PROPORTIONS OF WORLDWIDE OTHER ADD-ONS SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	37.5	35.5	33.4	31.1	31.0	28.1
Western Europe	24.9	25.0	23.4	22.4	20.6	20.1
Asia/Pacific	27.5	27.4	29.4	31.3	32.2	34.2
Latin America	1.2	1.3	1.6	1.8	1.9	2.1
Central and Eastern Europe	4.3	5.2	5.7	6.2	6.5	7.0
Middle East/Africa	4.7	5.6	6.5	7.3	7.8	8.5
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 91

OTHER ADD-ONS AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	0.6	0.5	0.4	0.4	0.4	0.3
Western Europe	0.4	0.3	0.3	0.3	0.3	0.2
Asia/Pacific	0.4	0.4	0.4	0.4	0.4	0.4
Latin America	0.0	0.0	0.0	0.0	0.0	0.0
Central and Eastern Europe	0.1	0.1	0.1	0.1	0.1	0.1
Middle East/Africa	0.1	0.1	0.1	0.1	0.1	0.1
Worldwide	1.5	1.3	1.3	1.2	1.2	1.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 92

WORLDWIDE PERIPHERALS TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	25,730.4	26,182.7	26,892.0	28,361.2	30,950.4	33,586.7
Western Europe	17,222.7	20,171.6	25,257.6	30,105.1	34,069.9	36,863.8
Asia/Pacific	13,287.7	13,971.8	15,329.0	16,883.9	18,446.4	20,354.3
Latin America	1,606.6	1,609.1	1,793.2	1,974.4	2,147.1	2,344.8
Central and Eastern Europe	1,870.1	2,023.4	2,203.2	2,378.5	2,535.0	2,693.6
Middle East/Africa	1,562.9	1,697.1	1,897.1	2,109.2	2,310.0	2,509.9
Worldwide	61,280.4	65,655.7	73,372.1	81,812.2	90,458.7	98,353.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 93

GROWTH IN WORLDWIDE PERIPHERALS TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	1.8	2.7	5.5	9.1	8.5	6.4
Western Europe	17.1	25.2	19.2	13.2	8.2	16.3
Asia/Pacific	5.1	9.7	10.1	9.3	10.3	9.9
Latin America	0.2	11.4	10.1	8.7	9.2	9.9
Central and Eastern Europe	8.2	8.9	8.0	6.6	6.3	7.4
Middle East/Africa	8.6	11.8	11.2	9.5	8.7	10.3
Worldwide	7.1	11.8	11.5	10.6	8.7	10.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 94

PROPORTIONS OF WORLDWIDE PERIPHERALS TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	42.0	39.9	36.7	34.7	34.2	34.1
Western Europe	28.1	30.7	34.4	36.8	37.7	37.5
Asia/Pacific	21.7	21.3	20.9	20.6	20.4	20.7
Latin America	2.6	2.5	2.4	2.4	2.4	2.4
Central and Eastern Europe	3.1	3.1	3.0	2.9	2.8	2.7
Middle East/Africa	2.6	2.6	2.6	2.6	2.6	2.6
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 95

PERIPHERALS TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	3.0	3.0	3.0	2.9	3.0	3.1
Western Europe	2.0	2.3	2.8	3.1	3.3	3.3
Asia/Pacific	1.5	1.6	1.7	1.7	1.8	1.8
Latin America	0.2	0.2	0.2	0.2	0.2	0.2
Central and Eastern Europe	0.2	0.2	0.2	0.2	0.2	0.2
Middle East/Africa	0.2	0.2	0.2	0.2	0.2	0.2
Worldwide	7.1	7.6	8.1	8.4	8.7	8.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 96

WORLDWIDE NETWORKING EQUIPMENT SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	23,878.5	22,887.1	23,749.6	25,193.8	27,289.0	29,787.9
Western Europe	12,634.3	12,650.7	13,319.1	14,700.0	16,232.9	17,591.9
Asia/Pacific	9,845.1	9,559.4	10,191.1	11,225.3	12,617.3	13,912.8
Latin America	1,683.5	1,730.4	1,834.9	1,934.5	2,051.7	2,257.6
Central and Eastern Europe	1,205.2	1,311.5	1,423.9	1,550.3	1,696.1	1,887.7
Middle East/Africa	1,188.7	1,329.3	1,598.2	1,819.5	2,062.3	2,279.1
Worldwide	50,435.3	49,468.4	52,116.8	56,423.4	61,949.3	67,716.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 97

GROWTH IN WORLDWIDE NETWORKING EQUIPMENT SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-4.2	3.8	6.1	8.3	9.2	6.8
Western Europe	0.1	5.3	10.4	10.4	8.4	8.6
Asia/Pacific	-2.9	6.6	10.1	12.4	10.3	9.8
Latin America	2.8	6.0	5.4	6.1	10.0	6.9
Central and Eastern Europe	8.8	8.6	8.9	9.4	11.3	9.5
Middle East/Africa	11.8	20.2	13.8	13.3	10.5	14.4
Worldwide	-1.9	5.4	8.3	9.8	9.3	8.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 98

PROPORTIONS OF WORLDWIDE NETWORKING EQUIPMENT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	47.3	46.3	45.6	44.7	44.1	44.0
Western Europe	25.1	25.6	25.6	26.1	26.2	26.0
Asia/Pacific	19.5	19.3	19.6	19.9	20.4	20.5
Latin America	3.3	3.5	3.5	3.4	3.3	3.3
Central and Eastern Europe	2.4	2.7	2.7	2.7	2.7	2.8
Middle East/Africa	2.4	2.7	3.1	3.2	3.3	3.4
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 99

NETWORKING EQUIPMENT AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	2.8	2.6	2.6	2.6	2.6	2.7
Western Europe	1.5	1.5	1.5	1.5	1.6	1.6
Asia/Pacific	1.1	1.1	1.1	1.2	1.2	1.3
Latin America	0.2	0.2	0.2	0.2	0.2	0.2
Central and Eastern Europe	0.1	0.2	0.2	0.2	0.2	0.2
Middle East/Africa	0.1	0.2	0.2	0.2	0.2	0.2
Worldwide	5.8	5.7	5.7	5.8	6.0	6.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

FORECAST BY MARKET

Tables 100–114 illustrate regional summaries for hardware, software, and services market growth from 2002 to 2007.

TABLE 100

WORLDWIDE HARDWARE TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	134,020.4	128,089.1	131,106.3	135,241.9	139,376.3	143,094.5
Western Europe	93,339.8	91,911.2	96,758.6	104,515.4	110,754.9	116,806.2
Asia/Pacific	84,895.8	84,109.6	89,259.5	96,100.6	103,673.3	111,394.8
Latin America	12,861.8	12,563.1	13,405.8	14,227.0	14,953.1	15,785.3
Central and Eastern Europe	9,116.9	9,752.5	10,811.3	11,930.4	13,115.1	14,335.4
Middle East/Africa	8,013.2	8,659.7	9,816.4	10,951.3	12,149.2	13,356.6
Worldwide	342,247.9	335,085.3	351,157.8	372,966.6	394,021.9	414,772.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 101

GROWTH IN WORLDWIDE HARDWARE TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-4.4	2.4	3.2	3.1	2.7	2.8
Western Europe	-1.5	5.3	8.0	6.0	5.5	6.2
Asia/Pacific	-0.9	6.1	7.7	7.9	7.4	7.3
Latin America	-2.3	6.7	6.1	5.1	5.6	5.9
Central and Eastern Europe	7.0	10.9	10.4	9.9	9.3	10.1
Middle East/Africa	8.1	13.4	11.6	10.9	9.9	11.4
Worldwide	-2.1	4.8	6.2	5.6	5.3	5.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 102

PROPORTIONS OF WORLDWIDE HARDWARE TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	39.2	38.2	37.3	36.3	35.4	34.5
Western Europe	27.3	27.4	27.6	28.0	28.1	28.2
Asia/Pacific	24.8	25.1	25.4	25.8	26.3	26.9
Latin America	3.8	3.7	3.8	3.8	3.8	3.8
Central and Eastern Europe	2.7	2.9	3.1	3.2	3.3	3.5
Middle East/Africa	2.3	2.6	2.8	2.9	3.1	3.2
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 103

HARDWARE TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	15.5	14.7	14.4	14.0	13.5	13.0
Western Europe	10.8	10.6	10.6	10.8	10.7	10.6
Asia/Pacific	9.8	9.7	9.8	9.9	10.0	10.1
Latin America	1.5	1.4	1.5	1.5	1.4	1.4
Central and Eastern Europe	1.1	1.1	1.2	1.2	1.3	1.3
Middle East/Africa	0.9	1.0	1.1	1.1	1.2	1.2
Worldwide	39.7	38.6	38.6	38.5	38.1	37.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 104

WORLDWIDE PACKAGED SOFTWARE TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	85,624.4	87,631.0	91,468.4	97,443.0	104,636.3	111,242.3
Western Europe	53,132.6	54,684.0	57,474.1	61,383.7	65,939.2	70,756.2
Asia/Pacific	23,458.9	24,410.3	26,360.5	28,807.3	31,675.6	34,796.7
Latin America	3,275.5	3,449.8	3,773.1	4,130.2	4,480.4	4,782.6
Central and Eastern Europe	2,651.6	3,071.5	3,499.8	3,946.2	4,399.0	4,838.4
Middle East/Africa	2,665.4	2,921.4	3,301.6	3,740.4	4,164.0	4,682.8
Worldwide	170,808.2	176,167.9	185,877.5	199,450.8	215,294.5	231,099.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 105

GROWTH IN WORLDWIDE PACKAGED SOFTWARE TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.3	4.4	6.5	7.4	6.3	6.1
Western Europe	2.9	5.1	6.8	7.4	7.3	6.7
Asia/Pacific	4.1	8.0	9.3	10.0	9.9	9.3
Latin America	5.3	9.4	9.5	8.5	6.7	8.5
Central and Eastern Europe	15.8	13.9	12.8	11.5	10.0	12.0
Middle East/Africa	9.6	13.0	13.3	11.3	12.5	12.5
Worldwide	3.1	5.5	7.3	7.9	7.3	7.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 106

PROPORTIONS OF WORLDWIDE PACKAGED SOFTWARE TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	50.1	49.7	49.2	48.9	48.6	48.1
Western Europe	31.1	31.0	30.9	30.8	30.6	30.6
Asia/Pacific	13.7	13.9	14.2	14.4	14.7	15.1
Latin America	1.9	2.0	2.0	2.1	2.1	2.1
Central and Eastern Europe	1.6	1.7	1.9	2.0	2.0	2.1
Middle East/Africa	1.6	1.7	1.8	1.9	1.9	2.0
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 107

PACKAGED SOFTWARE TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	9.9	10.1	10.0	10.1	10.1	10.1
Western Europe	6.2	6.3	6.3	6.3	6.4	6.4
Asia/Pacific	2.7	2.8	2.9	3.0	3.1	3.2
Latin America	0.4	0.4	0.4	0.4	0.4	0.4
Central and Eastern Europe	0.3	0.4	0.4	0.4	0.4	0.4
Middle East/Africa	0.3	0.3	0.4	0.4	0.4	0.4
Worldwide	19.8	20.3	20.4	20.6	20.8	21.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 108

WORLDWIDE SERVICES TOTAL SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	169,534.4	173,189.0	181,089.5	191,947.6	204,888.9	218,199.9
Western Europe	110,401.3	111,620.6	113,711.5	118,458.6	125,973.5	133,702.4
Asia/Pacific	53,751.1	55,513.5	59,142.9	63,635.3	69,056.7	75,276.7
Latin America	7,258.7	7,084.2	7,822.2	8,713.0	9,674.1	10,690.0
Central and Eastern Europe	4,167.8	4,735.5	5,363.6	6,192.2	7,136.5	8,215.5
Middle East/Africa	4,970.3	5,439.8	6,164.0	7,022.6	7,831.9	8,726.4
Worldwide	350,083.7	357,582.5	373,293.5	395,969.4	424,561.7	454,811.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 109

GROWTH IN WORLDWIDE SERVICES TOTAL SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	2.2	4.6	6.0	6.7	6.5	5.9
Western Europe	1.1	1.9	4.2	6.3	6.1	4.6
Asia/Pacific	3.3	6.5	7.6	8.5	9.0	7.9
Latin America	-2.4	10.4	11.4	11.0	10.5	10.8
Central and Eastern Europe	13.6	13.3	15.5	15.2	15.1	14.8
Middle East/Africa	9.4	13.3	13.9	11.5	11.4	12.5
Worldwide	2.1	4.4	6.1	7.2	7.1	6.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 110

PROPORTIONS OF WORLDWIDE SERVICES TOTAL SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	48.4	48.4	48.5	48.5	48.3	48.0
Western Europe	31.5	31.2	30.5	29.9	29.7	29.4
Asia/Pacific	15.4	15.5	15.8	16.1	16.3	16.6
Latin America	2.1	2.0	2.1	2.2	2.3	2.4
Central and Eastern Europe	1.2	1.3	1.4	1.6	1.7	1.8
Middle East/Africa	1.4	1.5	1.7	1.8	1.8	1.9
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 111

SERVICES TOTAL AS A PROPORTION OF TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	19.6	19.9	19.9	19.8	19.8	19.8
Western Europe	12.8	12.8	12.5	12.2	12.2	12.1
Asia/Pacific	6.2	6.4	6.5	6.6	6.7	6.8
Latin America	0.8	0.8	0.9	0.9	0.9	1.0
Central and Eastern Europe	0.5	0.5	0.6	0.6	0.7	0.7
Middle East/Africa	0.6	0.6	0.7	0.7	0.8	0.8
Worldwide	40.6	41.2	41.0	40.9	41.1	41.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 112

WORLDWIDE TOTAL IT SPENDING BY REGION, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
North America	389,179.1	388,909.0	403,664.2	424,632.4	448,901.5	472,536.7
Western Europe	256,873.7	258,215.8	267,944.1	284,357.7	302,667.6	321,264.9
Asia/Pacific	162,105.9	164,033.4	174,762.9	188,543.2	204,405.6	221,468.3
Latin America	23,396.0	23,097.1	25,001.0	27,070.3	29,107.5	31,257.9
Central and Eastern Europe	15,936.3	17,559.5	19,674.6	22,068.8	24,650.6	27,389.3
Middle East/Africa	15,648.9	17,020.8	19,282.0	21,714.4	24,145.2	26,765.8
Worldwide	863,139.8	868,835.6	910,328.8	968,386.8	1,033,878.1	1,100,682.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 113

GROWTH IN WORLDWIDE TOTAL IT SPENDING BY REGION, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
North America	-0.1	3.8	5.2	5.7	5.3	5.0
Western Europe	0.5	3.8	6.1	6.4	6.1	5.6
Asia/Pacific	1.2	6.5	7.9	8.4	8.3	7.8
Latin America	-1.3	8.2	8.3	7.5	7.4	7.9
Central and Eastern Europe	10.2	12.0	12.2	11.7	11.1	11.8
Middle East/Africa	8.8	13.3	12.6	11.2	10.9	12.0
Worldwide	0.7	4.8	6.4	6.8	6.5	6.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 114

PROPORTIONS OF WORLDWIDE TOTAL IT SPENDING BY REGION, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
North America	45.1	44.8	44.3	43.8	43.4	42.9
Western Europe	29.8	29.7	29.4	29.4	29.3	29.2
Asia/Pacific	18.8	18.9	19.2	19.5	19.8	20.1
Latin America	2.7	2.7	2.7	2.8	2.8	2.8
Central and Eastern Europe	1.8	2.0	2.2	2.3	2.4	2.5
Middle East/Africa	1.8	2.0	2.1	2.2	2.3	2.4
Worldwide	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

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NORTH AMERICA

Prospects for the North American IT market are closely tied to those of the economy. Accordingly, a second-half acceleration in the economy should set the stage for a revival in IT spending. However, although some high-frequency data on technology spending is promising, there is still a paucity of hard evidence confirming that the recovery is under way. IDC is, therefore, cautious with respect to our IT spending forecast for North America. Although we expect some improvement in the second half of the year, our forecast calls for growth to remain flat for 2003 as a whole and climb only gradually toward gross domestic product (GDP) growth levels in 2004/2005.

Although we expect some improvement in the second half of the year, our forecast calls for growth to remain flat for 2003 as a whole and climb only gradually toward GDP growth levels in 2004/2005.

UNITED STATES

The past eight months have been rather tumultuous for the U.S. economy; likewise for the IT market. Tentative but positive signs of recovery started to flicker toward the end of 2002, as the downward spiral in corporate technology spending appeared to hit bottom. But the market failed to transition to a new growth phase. Instead, IT spending remained stuck in a low-level holding pattern.

Depending on one's perspective, the U.S. technology market's sluggish performance can be seen in a positive or negative light. True, the market as a whole failed to achieve any meaningful expansion, let alone the double-digit growth of the 1990s boom. On the other hand, government statistics confirm that technology is about the only thing on which companies are willing to spend new money. Even as businesses continue to slash spending on everything from office buildings to heavy machinery to transportation equipment, they are beginning to make incremental investments in IT.

Even as businesses continue to slash spending on everything from office buildings to heavy machinery to transportation equipment, they are beginning to make incremental investments in IT.

Furthermore, the recent period of soft IT spending is hardly surprising given the unusually difficult external environment. Like other types of investment, business technology spending is sensitive to economic factors. To oversimplify: GDP growth determines IT capacity needs. Profits, stock prices, and interest rates influence the cost of financing capital expenditures. "Confidence" — a notoriously intangible concept — can affect business managers' propensity to make new investments, notwithstanding their needs and ability to finance them.

The Iraqi crisis undermined IT investment on every count. Heightened risk aversion triggered a stock market slide and put upward pressure on commercial lending rates. Rising energy prices ate into corporate profits. Pervasive uncertainty deterred business and consumer spending. All of these factors slowed GDP growth. Faced with higher financing costs and uncertain business prospects, corporate managers were understandably reticent to commit resources to new IT projects.

The Iraqi crisis undermined IT investment on every count.

Macroeconomic conditions are falling into place for an IT spending revival. The problem is that, as yet, there is still little hard evidence to confirm that the market has decisively turned the corner. IT vendor revenues are stable but have not posted much improvement. Technology might be the investment of choice, but this is small comfort when overall business spending is declining. Quarterly IDC data on IT shipments is flashing amber, not green. Consequently, although there are reasons to be optimistic that a recovery is at hand, IDC is conservative with respect to our IT spending outlook. Our forecast calls for flat spending this year, followed by growth slightly below that of the overall economy in 2004.

CANADA

Growth may be down, but the Canadian IT market remains a vital contributor to the overall economy, and IT itself is more pervasive and necessary than ever. In terms of absolute market size, the industry remains close to its historical high points in dollar terms, despite the sales growth crash of 2001 and 2002. Despite two years of poor growth, the market's size was still US$22.7 billion in 2002.

IDC Canada forecasts a CAGR of 2.6% for the overall IT market over the 2003–2007 period — positive but not necessarily exciting. Although the overall market is growing relatively slowly, IDC anticipates significant opportunities to exist within it. These opportunities are represented by large, $1 billion+ IT markets that are forecast to experience high single- or double-digit growth or generate significant amounts in new IT spending from 2003 to 2007. These markets will generate tremendous value both for the customers who buy into them and for the vendors that provide the technology and services to fulfill users' requirements.

Tables 115–128 illustrate IT spending forecasts for North America, with country-level detail for Canada and the United States.

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TABLE 115

IT SPENDING IN NORTH AMERICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	18,824.1	18,552.9	18,996.3	19,774.5	20,795.2	21,849.4
Implementation	62,422.2	61,939.3	63,702.1	66,651.4	70,488.9	74,370.5
Maintenance and support	45,305.0	47,737.9	50,775.1	54,892.7	59,496.4	64,217.2
Operations	32,791.9	35,091.1	37,780.0	40,626.6	43,495.5	46,415.8
IT training and education	10,191.2	9,867.7	9,836.1	10,002.3	10,612.9	11,347.0
Services total	169,534.4	173,189.0	181,089.5	191,947.6	204,888.9	218,199.9
Packaged software						
System infrastructure software	19,708.6	20,176.4	21,019.4	22,421.1	24,263.9	26,227.1
Appl. development and deployment	19,741.8	20,208.4	21,049.6	22,450.8	24,287.8	26,230.9
Applications	46,174.0	47,246.1	49,399.4	52,571.1	56,084.7	58,784.4
Packaged software total	85,624.4	87,631.0	91,468.4	97,443.0	104,636.3	111,242.3
Hardware						
Systems						
High-end enterprise servers	4,672.0	3,795.0	3,692.6	3,834.0	4,052.3	4,121.8
Midrange enterprise servers	5,218.2	5,294.7	5,438.4	5,596.1	5,637.7	6,075.4
Volume servers	9,041.4	10,228.1	11,241.3	11,766.6	12,619.2	12,946.7
Servers total	18,931.5	19,317.8	20,372.2	21,196.6	22,309.2	23,144.0
Personal computers	54,450.0	49,228.2	49,757.3	49,981.3	48,014.9	45,449.9
Traditional workstations	1,062.9	606.8	389.7	272.0	205.1	164.1
Clients total	55,512.8	49,835.0	50,147.0	50,253.3	48,220.1	45,614.0
Systems total	74,444.4	69,152.8	70,519.2	71,450.0	70,529.2	68,758.0
Storage						
Disk systems	8,625.7	8,493.3	8,524.8	8,748.5	9,028.7	9,270.2
Tape automation	1,341.4	1,373.1	1,420.7	1,488.4	1,579.0	1,691.7
Storage total	9,967.2	9,866.4	9,945.5	10,236.9	10,607.7	10,961.9
Peripherals						
Printers and MFPs	17,971.6	17,940.3	17,721.8	17,490.4	17,529.0	17,476.1
Smart handheld devices	2,990.5	4,135.6	5,247.9	7,124.0	9,475.5	12,427.3
Other add-ons	4,768.3	4,106.8	3,922.3	3,746.7	3,945.9	3,683.3
Peripherals total	25,730.4	26,182.7	26,892.0	28,361.2	30,950.4	33,586.7
Networking equipment	23,878.5	22,887.1	23,749.6	25,193.8	27,289.0	29,787.9
Hardware total	134,020.4	128,089.1	131,106.3	135,241.9	139,376.3	143,094.5
Packaged software total	85,624.4	87,631.0	91,468.4	97,443.0	104,636.3	111,242.3
Services total	169,534.4	173,189.0	181,089.5	191,947.6	204,888.9	218,199.9
Total IT	389,179.1	388,909.0	403,664.2	424,632.4	448,901.5	472,536.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 116

GROWTH IN IT SPENDING IN NORTH AMERICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.4	2.4	4.1	5.2	5.1	4.2
Implementation	-0.8	2.8	4.6	5.8	5.5	4.7
Maintenance and support	5.4	6.4	8.1	8.4	7.9	7.7
Operations	7.0	7.7	7.5	7.1	6.7	7.2
IT training and education	-3.2	-0.3	1.7	6.1	6.9	3.6
Services total	2.2	4.6	6.0	6.7	6.5	5.9
Packaged software						
System infrastructure software	2.4	4.2	6.7	8.2	8.1	6.8
Appl. development and deployment	2.4	4.2	6.7	8.2	8.0	6.7
Applications	2.3	4.6	6.4	6.7	4.8	5.6
Packaged software total	2.3	4.4	6.5	7.4	6.3	6.1
Hardware						
Systems						
High-end enterprise servers	-18.8	-2.7	3.8	5.7	1.7	2.1
Midrange enterprise servers	1.5	2.7	2.9	0.7	7.8	3.5
Volume servers	13.1	9.9	4.7	7.2	2.6	6.1
Servers total	2.0	5.5	4.0	5.2	3.7	4.6
Personal computers	-9.6	1.1	0.5	-3.9	-5.3	-2.0
Traditional workstations	-42.9	-35.8	-30.2	-24.6	-20.0	-27.9
Clients total	-9.6	1.1	0.5	-3.9	-5.3	-2.0
Systems total	-7.1	2.0	1.3	-1.3	-2.5	-0.1
Storage						
Disk systems	-1.5	0.4	2.6	3.2	2.7	2.2
Tape automation	2.4	3.5	4.8	6.1	7.1	5.4
Storage total	-1.0	0.8	2.9	3.6	3.3	2.7
Peripherals						
Printers and MFPs	-0.2	-1.2	-1.3	0.2	-0.3	-0.7
Smart handheld devices	38.3	26.9	35.7	33.0	31.2	31.7
Other add-ons	-13.9	-4.5	-4.5	5.3	-6.7	-2.7
Peripherals total	1.8	2.7	5.5	9.1	8.5	6.4
Networking equipment	-4.2	3.8	6.1	8.3	9.2	6.8
Hardware total	-4.4	2.4	3.2	3.1	2.7	2.8
Packaged software total	2.3	4.4	6.5	7.4	6.3	6.1
Services total	2.2	4.6	6.0	6.7	6.5	5.9
Total IT	-0.1	3.8	5.2	5.7	5.3	5.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 117

PROPORTIONS OF IT SPENDING CATEGORIES IN NORTH AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.8	4.8	4.7	4.7	4.6	4.6
Implementation	16.0	15.9	15.8	15.7	15.7	15.7
Maintenance and support	11.6	12.3	12.6	12.9	13.3	13.6
Operations	8.4	9.0	9.4	9.6	9.7	9.8
IT training and education	2.6	2.5	2.4	2.4	2.4	2.4
Services total	43.6	44.5	44.9	45.2	45.6	46.2
Packaged software						
System infrastructure software	5.1	5.2	5.2	5.3	5.4	5.6
Appl. development and deployment	5.1	5.2	5.2	5.3	5.4	5.6
Applications	11.9	12.1	12.2	12.4	12.5	12.4
Packaged software total	22.0	22.5	22.7	22.9	23.3	23.5
Hardware						
Systems						
High-end enterprise servers	1.2	1.0	0.9	0.9	0.9	0.9
Midrange enterprise servers	1.3	1.4	1.3	1.3	1.3	1.3
Volume servers	2.3	2.6	2.8	2.8	2.8	2.7
Servers total	4.9	5.0	5.0	5.0	5.0	4.9
Personal computers	14.0	12.7	12.3	11.8	10.7	9.6
Traditional workstations	0.3	0.2	0.1	0.1	0.0	0.0
Clients total	14.0	12.7	12.3	11.8	10.7	9.6
Systems total	19.1	17.8	17.5	16.8	15.7	14.6
Storage						
Disk systems	2.2	2.2	2.1	2.1	2.0	2.0
Tape automation	0.3	0.4	0.4	0.4	0.4	0.4
Storage total	2.6	2.5	2.5	2.4	2.4	2.3
Peripherals						
Printers and MFPs	4.6	4.6	4.4	4.1	3.9	3.7
Smart handheld devices	0.8	1.1	1.3	1.7	2.1	2.6
Other add-ons	1.2	1.1	1.0	0.9	0.9	0.8
Peripherals total	6.6	6.7	6.7	6.7	6.9	7.1
Networking equipment	6.1	5.9	5.9	5.9	6.1	6.3
Hardware total	34.4	32.9	32.5	31.8	31.0	30.3
Packaged software total	22.0	22.5	22.7	22.9	23.3	23.5
Services total	43.6	44.5	44.9	45.2	45.6	46.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 118

NORTH AMERICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	50.9	50.2	49.7	49.1	48.4	47.7
Implementation	46.8	46.2	45.8	45.5	45.0	44.4
Maintenance and support	49.0	49.9	50.7	51.5	51.9	52.1
Operations	50.0	50.4	50.9	50.8	50.4	49.9
IT training and education	47.0	46.1	45.3	44.6	44.4	44.6
Services total	48.4	48.4	48.5	48.5	48.3	48.0
Packaged software						
System infrastructure software	43.2	42.4	41.5	41.1	41.1	41.1
Appl. development and deployment	50.4	50.2	49.7	49.4	49.1	48.9
Applications	53.7	53.5	53.2	52.9	52.5	51.8
Packaged software total	50.1	49.7	49.2	48.9	48.6	48.1
Hardware						
Systems						
High-end enterprise servers	35.0	32.1	32.2	34.1	36.2	37.7
Midrange enterprise servers	35.3	39.4	38.8	38.2	38.2	38.8
Volume servers	42.9	46.5	46.8	45.7	45.1	44.1
Servers total	38.5	40.9	41.1	41.0	41.3	41.3
Personal computers	35.2	33.5	33.1	31.9	30.0	27.6
Traditional workstations	45.1	36.2	30.2	26.0	23.4	21.0
Clients total	35.4	33.5	33.0	31.9	29.9	27.6
Systems total	36.1	35.3	35.0	34.1	32.8	31.1
Storage						
Disk systems	40.0	40.3	39.9	39.4	39.1	38.8
Tape automation	45.8	46.6	46.6	46.7	47.2	47.8
Storage total	40.7	41.1	40.7	40.3	40.1	40.0
Peripherals						
Printers and MFPs	43.7	41.6	39.4	37.5	36.2	35.2
Smart handheld devices	40.0	37.8	31.4	30.8	32.3	35.0
Other add-ons	37.5	35.5	33.4	31.1	31.0	28.1
Peripherals total	42.0	39.9	36.7	34.7	34.2	34.1
Networking equipment	47.3	46.3	45.6	44.7	44.1	44.0
Hardware total	39.2	38.2	37.3	36.3	35.4	34.5
Packaged software total	50.1	49.7	49.2	48.9	48.6	48.1
Services total	48.4	48.4	48.5	48.5	48.3	48.0
Total IT	45.1	44.8	44.3	43.8	43.4	42.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 119

IT SPENDING IN CANADA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1,082.4	1,045.8	1,067.8	1,104.3	1,149.4	1,201.4
Implementation	4,046.8	3,915.2	3,974.4	4,071.5	4,193.5	4,332.2
Maintenance and support	2,335.7	2,456.3	2,582.4	2,697.3	2,830.4	2,967.8
Operations	2,112.5	2,309.6	2,499.8	2,653.0	2,814.0	2,977.8
IT training and education	573.5	562.7	578.9	605.4	634.9	663.1
Services total	10,151.0	10,289.6	10,703.4	11,131.4	11,622.1	12,142.3
Packaged software						
System infrastructure software	914.9	909.1	926.7	954.5	984.8	1,019.8
Appl. development and deployment	1,052.1	1,064.9	1,087.5	1,117.5	1,145.1	1,172.4
Applications	1,860.5	1,892.4	1,939.7	2,008.1	2,075.9	2,136.8
Packaged software total	3,827.5	3,866.4	3,953.9	4,080.2	4,205.8	4,328.9
Hardware						
Systems						
High-end enterprise servers	320.8	284.7	291.4	283.1	261.6	242.7
Midrange enterprise servers	405.0	432.8	463.6	486.1	500.5	500.1
Volume servers	545.7	587.1	595.3	625.7	675.9	737.0
Servers total	1,271.6	1,304.6	1,350.3	1,394.8	1,438.1	1,479.8
Personal computers	3,603.3	3,271.8	3,022.5	2,931.6	2,840.2	2,742.1
Traditional workstations	117.1	112.2	107.7	102.9	98.6	94.8
Clients total	3,720.4	3,384.0	3,130.2	3,034.5	2,938.8	2,836.9
Systems total	4,992.0	4,688.7	4,480.5	4,429.3	4,376.9	4,316.7
Storage						
Disk systems	686.7	672.3	689.8	710.5	740.9	763.8
Tape automation	119.5	117.0	111.8	110.1	111.1	110.8
Storage total	806.2	789.3	801.6	820.6	852.0	874.6
Peripherals						
Printers and MFPs	1,069.7	1,140.3	1,194.9	1,173.4	1,260.5	1,274.3
Smart handheld devices	240.4	221.3	233.7	232.9	231.1	233.7
Other add-ons	641.7	672.5	701.4	732.3	765.2	798.9
Peripherals total	1,951.7	2,034.1	2,130.0	2,138.5	2,256.8	2,306.8
Networking equipment	957.5	967.1	996.1	1,036.0	1,098.1	1,153.0
Hardware total	8,707.5	8,479.1	8,408.2	8,424.4	8,583.8	8,651.1
Packaged software total	3,827.5	3,866.4	3,953.9	4,080.2	4,205.8	4,328.9
Services total	10,151.0	10,289.6	10,703.4	11,131.4	11,622.1	12,142.3
Total IT	22,686.0	22,635.1	23,065.4	23,636.0	24,411.8	25,122.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 120

GROWTH IN IT SPENDING IN CANADA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-3.4	2.1	3.4	4.1	4.5	3.5
Implementation	-3.3	1.5	2.4	3.0	3.3	2.6
Maintenance and support	5.2	5.1	4.4	4.9	4.9	4.8
Operations	9.3	8.2	6.1	6.1	5.8	6.6
IT training and education	-1.9	2.9	4.6	4.9	4.4	4.2
Services total	1.4	4.0	4.0	4.4	4.5	4.2
Packaged software						
System infrastructure software	-0.6	1.9	3.0	3.2	3.6	2.9
Appl. development and deployment	1.2	2.1	2.8	2.5	2.4	2.4
Applications	1.7	2.5	3.5	3.4	2.9	3.1
Packaged software total	1.0	2.3	3.2	3.1	2.9	2.9
Hardware						
Systems						
High-end enterprise servers	-11.2	2.3	-2.9	-7.6	-7.2	-3.9
Midrange enterprise servers	6.9	7.1	4.8	3.0	-0.1	3.7
Volume servers	7.6	1.4	5.1	8.0	9.0	5.9
Servers total	2.6	3.5	3.3	3.1	2.9	3.2
Personal computers	-9.2	-7.6	-3.0	-3.1	-3.5	-4.3
Traditional workstations	-4.2	-4.0	-4.5	-4.2	-3.8	-4.1
Clients total	-9.2	-7.6	-3.0	-3.1	-3.5	-4.3
Systems total	-6.1	-4.4	-1.1	-1.2	-1.4	-2.0
Storage						
Disk systems	-2.1	2.6	3.0	4.3	3.1	3.2
Tape automation	-2.1	-4.5	-1.5	1.0	-0.3	-1.4
Storage total	-2.1	1.6	2.4	3.8	2.6	2.6
Peripherals						
Printers and MFPs	6.6	4.8	-1.8	7.4	1.1	2.8
Smart handheld devices	-7.9	5.6	-0.4	-0.8	1.1	1.4
Other add-ons	4.8	4.3	4.4	4.5	4.4	4.4
Peripherals total	4.2	4.7	0.4	5.5	2.2	3.2
Networking equipment	1.0	3.0	4.0	6.0	5.0	4.5
Hardware total	-2.6	-0.8	0.2	1.9	0.8	0.5
Packaged software total	1.0	2.3	3.2	3.1	2.9	2.9
Services total	1.4	4.0	4.0	4.4	4.5	4.2
Total IT	-0.2	1.9	2.5	3.3	2.9	2.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 121

PROPORTIONS OF IT SPENDING CATEGORIES IN CANADA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.8	4.6	4.6	4.7	4.7	4.8
Implementation	17.8	17.3	17.2	17.2	17.2	17.2
Maintenance and support	10.3	10.9	11.2	11.4	11.6	11.8
Operations	9.3	10.2	10.8	11.2	11.5	11.9
IT training and education	2.5	2.5	2.5	2.6	2.6	2.6
Services total	44.7	45.5	46.4	47.1	47.6	48.3
Packaged software						
System infrastructure software	4.0	4.0	4.0	4.0	4.0	4.1
Appl. development and deployment	4.6	4.7	4.7	4.7	4.7	4.7
Applications	8.2	8.4	8.4	8.5	8.5	8.5
Packaged software total	16.9	17.1	17.1	17.3	17.2	17.2
Hardware						
Systems						
High-end enterprise servers	1.4	1.3	1.3	1.2	1.1	1.0
Midrange enterprise servers	1.8	1.9	2.0	2.1	2.1	2.0
Volume servers	2.4	2.6	2.6	2.6	2.8	2.9
Servers total	5.6	5.8	5.9	5.9	5.9	5.9
Personal computers	15.9	14.5	13.1	12.4	11.6	10.9
Traditional workstations	0.5	0.5	0.5	0.4	0.4	0.4
Clients total	15.9	14.5	13.1	12.4	11.6	10.9
Systems total	22.0	20.7	19.4	18.7	17.9	17.2
Storage						
Disk systems	3.0	3.0	3.0	3.0	3.0	3.0
Tape automation	0.5	0.5	0.5	0.5	0.5	0.4
Storage total	3.6	3.5	3.5	3.5	3.5	3.5
Peripherals						
Printers and MFPs	4.7	5.0	5.2	5.0	5.2	5.1
Smart handheld devices	1.1	1.0	1.0	1.0	0.9	0.9
Other add-ons	2.8	3.0	3.0	3.1	3.1	3.2
Peripherals total	8.6	9.0	9.2	9.0	9.2	9.2
Networking equipment	4.2	4.3	4.3	4.4	4.5	4.6
Hardware total	38.4	37.5	36.5	35.6	35.2	34.4
Packaged software total	16.9	17.1	17.1	17.3	17.2	17.2
Services total	44.7	45.5	46.4	47.1	47.6	48.3
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 122

CANADA PROPORTIONS OF THE IT SPENDING IN NORTH AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.8	5.6	5.6	5.6	5.5	5.5
Implementation	6.5	6.3	6.2	6.1	5.9	5.8
Maintenance and support	5.2	5.1	5.1	4.9	4.8	4.6
Operations	6.4	6.6	6.6	6.5	6.5	6.4
IT training and education	5.6	5.7	5.9	6.1	6.0	5.8
Services total	6.0	5.9	5.9	5.8	5.7	5.6
Packaged software						
System infrastructure software	4.6	4.5	4.4	4.3	4.1	3.9
Appl. development and deployment	5.3	5.3	5.2	5.0	4.7	4.5
Applications	4.0	4.0	3.9	3.8	3.7	3.6
Packaged software total	4.5	4.4	4.3	4.2	4.0	3.9
Hardware						
Systems						
High-end enterprise servers	6.9	7.5	7.9	7.4	6.5	5.9
Midrange enterprise servers	7.8	8.2	8.5	8.7	8.9	8.2
Volume servers	6.0	5.7	5.3	5.3	5.4	5.7
Servers total	6.7	6.8	6.6	6.6	6.4	6.4
Personal computers	6.6	6.6	6.1	5.9	5.9	6.0
Traditional workstations	11.0	18.5	27.6	37.8	48.0	57.8
Clients total	6.7	6.8	6.2	6.0	6.1	6.2
Systems total	6.7	6.8	6.4	6.2	6.2	6.3
Storage						
Disk systems	8.0	7.9	8.1	8.1	8.2	8.2
Tape automation	8.9	8.5	7.9	7.4	7.0	6.5
Storage total	8.1	8.0	8.1	8.0	8.0	8.0
Peripherals						
Printers and MFPs	6.0	6.4	6.7	6.7	7.2	7.3
Smart handheld devices	8.0	5.4	4.5	3.3	2.4	1.9
Other add-ons	13.5	16.4	17.9	19.5	19.4	21.7
Peripherals total	7.6	7.8	7.9	7.5	7.3	6.9
Networking equipment	4.0	4.2	4.2	4.1	4.0	3.9
Hardware total	6.5	6.6	6.4	6.2	6.2	6.0
Packaged software total	4.5	4.4	4.3	4.2	4.0	3.9
Services total	6.0	5.9	5.9	5.8	5.7	5.6
Total IT	5.8	5.8	5.7	5.6	5.4	5.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 123

CANADA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.9	2.8	2.8	2.7	2.7	2.6
Implementation	3.0	2.9	2.9	2.8	2.7	2.6
Maintenance and support	2.5	2.6	2.6	2.5	2.5	2.4
Operations	3.2	3.3	3.4	3.3	3.3	3.2
IT training and education	2.6	2.6	2.7	2.7	2.7	2.6
Services total	2.9	2.9	2.9	2.8	2.7	2.7
Packaged software						
System infrastructure software	2.0	1.9	1.8	1.7	1.7	1.6
Appl. development and deployment	2.7	2.6	2.6	2.5	2.3	2.2
Applications	2.2	2.1	2.1	2.0	1.9	1.9
Packaged software total	2.2	2.2	2.1	2.0	2.0	1.9
Hardware						
Systems						
High-end enterprise servers	2.4	2.4	2.5	2.5	2.3	2.2
Midrange enterprise servers	2.7	3.2	3.3	3.3	3.4	3.2
Volume servers	2.6	2.7	2.5	2.4	2.4	2.5
Servers total	2.6	2.8	2.7	2.7	2.7	2.6
Personal computers	2.3	2.2	2.0	1.9	1.8	1.7
Traditional workstations	5.0	6.7	8.4	9.8	11.2	12.1
Clients total	2.4	2.3	2.1	1.9	1.8	1.7
Systems total	2.4	2.4	2.2	2.1	2.0	2.0
Storage						
Disk systems	3.2	3.2	3.2	3.2	3.2	3.2
Tape automation	4.1	4.0	3.7	3.5	3.3	3.1
Storage total	3.3	3.3	3.3	3.2	3.2	3.2
Peripherals						
Printers and MFPs	2.6	2.6	2.7	2.5	2.6	2.6
Smart handheld devices	3.2	2.0	1.4	1.0	0.8	0.7
Other add-ons	5.0	5.8	6.0	6.1	6.0	6.1
Peripherals total	3.2	3.1	2.9	2.6	2.5	2.3
Networking equipment	1.9	2.0	1.9	1.8	1.8	1.7
Hardware total	2.5	2.5	2.4	2.3	2.2	2.1
Packaged software total	2.2	2.2	2.1	2.0	2.0	1.9
Services total	2.9	2.9	2.9	2.8	2.7	2.7
Total IT	2.6	2.6	2.5	2.4	2.4	2.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 124

IT SPENDING IN THE UNITED STATES, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	17,741.6	17,507.1	17,928.5	18,670.2	19,645.7	20,648.0
Implementation	58,375.4	58,024.1	59,727.6	62,579.9	66,295.4	70,038.3
Maintenance and support	42,969.3	45,281.6	48,192.7	52,195.4	56,666.1	61,249.4
Operations	30,679.3	32,781.5	35,280.2	37,973.6	40,681.5	43,438.0
IT training and education	9,617.7	9,305.0	9,257.2	9,397.0	9,978.1	10,683.9
Services total	159,383.3	162,899.4	170,386.1	180,816.1	193,266.8	206,057.6
Packaged software						
System infrastructure software	18,793.7	19,267.3	20,092.7	21,466.6	23,279.1	25,207.3
Appl. development and deployment	18,689.6	19,143.5	19,962.1	21,333.2	23,142.6	25,058.5
Applications	44,313.5	45,353.8	47,459.7	50,563.0	54,008.8	56,647.6
Packaged software total	81,796.8	83,764.6	87,514.5	93,362.8	100,430.4	106,913.4
Hardware						
Systems						
High-end enterprise servers	4,351.2	3,510.3	3,401.2	3,550.9	3,790.7	3,879.2
Midrange enterprise servers	4,813.1	4,861.9	4,974.7	5,110.0	5,137.1	5,575.3
Volume servers	8,495.7	9,641.0	10,646.0	11,140.9	11,943.3	12,209.7
Servers total	17,660.0	18,013.2	19,021.9	19,801.8	20,871.1	21,664.2
Personal computers	50,846.7	45,956.3	46,734.9	47,049.7	45,174.7	42,707.8
Traditional workstations	945.7	494.6	281.9	169.2	106.6	69.3
Clients total	51,792.4	46,451.0	47,016.8	47,218.8	45,281.3	42,777.1
Systems total	69,452.4	64,464.1	66,038.7	67,020.7	66,152.4	64,441.3
Storage						
Disk systems	7,939.0	7,821.0	7,835.0	8,038.0	8,287.8	8,506.4
Tape automation	1,221.9	1,256.2	1,308.9	1,378.3	1,467.9	1,580.9
Storage total	9,160.9	9,077.2	9,143.9	9,416.3	9,755.7	10,087.3
Peripherals						
Printers and MFPs	16,901.9	16,800.0	16,526.9	16,317.1	16,268.4	16,201.8
Smart handheld devices	2,750.1	3,914.3	5,014.2	6,891.1	9,244.4	12,193.7
Other add-ons	4,126.6	3,434.4	3,220.9	3,014.4	3,180.7	2,884.4
Peripherals total	23,778.7	24,148.6	24,762.0	26,222.7	28,693.5	31,279.9
Networking equipment	22,921.0	21,920.0	22,753.5	24,157.9	26,190.9	28,634.8
Hardware total	125,313.0	119,609.9	122,698.1	126,817.5	130,792.5	134,443.4
Packaged software total	81,796.8	83,764.6	87,514.5	93,362.8	100,430.4	106,913.4
Services total	159,383.3	162,899.4	170,386.1	180,816.1	193,266.8	206,057.6
Total IT	366,493.1	366,273.9	380,598.8	400,996.4	424,489.7	447,414.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 125

GROWTH IN IT SPENDING IN THE UNITED STATES, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.3	2.4	4.1	5.2	5.1	4.2
Implementation	-0.6	2.9	4.8	5.9	5.6	4.8
Maintenance and support	5.4	6.4	8.3	8.6	8.1	7.8
Operations	6.9	7.6	7.6	7.1	6.8	7.3
IT training and education	-3.3	-0.5	1.5	6.2	7.1	3.5
Services total	2.2	4.6	6.1	6.9	6.6	6.1
Packaged software						
System infrastructure software	2.5	4.3	6.8	8.4	8.3	6.9
Appl. development and deployment	2.4	4.3	6.9	8.5	8.3	7.0
Applications	2.3	4.6	6.5	6.8	4.9	5.7
Packaged software total	2.4	4.5	6.7	7.6	6.5	6.3
Hardware						
Systems						
High-end enterprise servers	-19.3	-3.1	4.4	6.8	2.3	2.5
Midrange enterprise servers	1.0	2.3	2.7	0.5	8.5	3.5
Volume servers	13.5	10.4	4.6	7.2	2.2	6.1
Servers total	2.0	5.6	4.1	5.4	3.8	4.7
Personal computers	-9.6	1.7	0.7	-4.0	-5.5	-1.8
Traditional workstations	-47.7	-43.0	-40.0	-37.0	-35.0	-38.8
Clients total	-9.6	1.7	0.7	-4.0	-5.5	-1.8
Systems total	-7.2	2.4	1.5	-1.3	-2.6	0.0
Storage						
Disk systems	-1.5	0.2	2.6	3.1	2.6	2.1
Tape automation	2.8	4.2	5.3	6.5	7.7	5.9
Storage total	-0.9	0.7	3.0	3.6	3.4	2.7
Peripherals						
Printers and MFPs	-0.6	-1.6	-1.3	-0.3	-0.4	-0.9
Smart handheld devices	42.3	28.1	37.4	34.1	31.9	32.9
Other add-ons	-16.8	-6.2	-6.4	5.5	-9.3	-4.3
Peripherals total	1.6	2.5	5.9	9.4	9.0	6.7
Networking equipment	-4.4	3.8	6.2	8.4	9.3	6.9
Hardware total	-4.6	2.6	3.4	3.1	2.8	3.0
Packaged software total	2.4	4.5	6.7	7.6	6.5	6.3
Services total	2.2	4.6	6.1	6.9	6.6	6.1
Total IT	-0.1	3.9	5.4	5.9	5.4	5.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 126

PROPORTIONS OF IT SPENDING CATEGORIES IN THE UNITED STATES, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.8	4.8	4.7	4.7	4.6	4.6
Implementation	15.9	15.8	15.7	15.6	15.6	15.7
Maintenance and support	11.7	12.4	12.7	13.0	13.3	13.7
Operations	8.4	8.9	9.3	9.5	9.6	9.7
IT training and education	2.6	2.5	2.4	2.3	2.4	2.4
Services total	43.5	44.5	44.8	45.1	45.5	46.1
Packaged software						
System infrastructure software	5.1	5.3	5.3	5.4	5.5	5.6
Appl. development and deployment	5.1	5.2	5.2	5.3	5.5	5.6
Applications	12.1	12.4	12.5	12.6	12.7	12.7
Packaged software total	22.3	22.9	23.0	23.3	23.7	23.9
Hardware						
Systems						
High-end enterprise servers	1.2	1.0	0.9	0.9	0.9	0.9
Midrange enterprise servers	1.3	1.3	1.3	1.3	1.2	1.2
Volume servers	2.3	2.6	2.8	2.8	2.8	2.7
Servers total	4.8	4.9	5.0	4.9	4.9	4.8
Personal computers	13.9	12.5	12.3	11.7	10.6	9.5
Traditional workstations	0.3	0.1	0.1	0.0	0.0	0.0
Clients total	13.9	12.5	12.3	11.7	10.6	9.5
Systems total	19.0	17.6	17.4	16.7	15.6	14.4
Storage						
Disk systems	2.2	2.1	2.1	2.0	2.0	1.9
Tape automation	0.3	0.3	0.3	0.3	0.3	0.4
Storage total	2.5	2.5	2.4	2.3	2.3	2.3
Peripherals						
Printers and MFPs	4.6	4.6	4.3	4.1	3.8	3.6
Smart handheld devices	0.8	1.1	1.3	1.7	2.2	2.7
Other add-ons	1.1	0.9	0.8	0.8	0.7	0.6
Peripherals total	6.5	6.6	6.5	6.5	6.8	7.0
Networking equipment	6.3	6.0	6.0	6.0	6.2	6.4
Hardware total	34.2	32.7	32.2	31.6	30.8	30.0
Packaged software total	22.3	22.9	23.0	23.3	23.7	23.9
Services total	43.5	44.5	44.8	45.1	45.5	46.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 127

UNITED STATES PROPORTIONS OF THE IT SPENDING IN NORTH AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	94.2	94.4	94.4	94.4	94.5	94.5
Implementation	93.5	93.7	93.8	93.9	94.1	94.2
Maintenance and support	94.8	94.9	94.9	95.1	95.2	95.4
Operations	93.6	93.4	93.4	93.5	93.5	93.6
IT training and education	94.4	94.3	94.1	93.9	94.0	94.2
Services total	94.0	94.1	94.1	94.2	94.3	94.4
Packaged software						
System infrastructure software	95.4	95.5	95.6	95.7	95.9	96.1
Appl. development and deployment	94.7	94.7	94.8	95.0	95.3	95.5
Applications	96.0	96.0	96.1	96.2	96.3	96.4
Packaged software total	95.5	95.6	95.7	95.8	96.0	96.1
Hardware						
Systems						
High-end enterprise servers	93.1	92.5	92.1	92.6	93.5	94.1
Midrange enterprise servers	92.2	91.8	91.5	91.3	91.1	91.8
Volume servers	94.0	94.3	94.7	94.7	94.6	94.3
Servers total	93.3	93.2	93.4	93.4	93.6	93.6
Personal computers	93.4	93.4	93.9	94.1	94.1	94.0
Traditional workstations	89.0	81.5	72.4	62.2	52.0	42.2
Clients total	93.3	93.2	93.8	94.0	93.9	93.8
Systems total	93.3	93.2	93.6	93.8	93.8	93.7
Storage						
Disk systems	92.0	92.1	91.9	91.9	91.8	91.8
Tape automation	91.1	91.5	92.1	92.6	93.0	93.5
Storage total	91.9	92.0	91.9	92.0	92.0	92.0
Peripherals						
Printers and MFPs	94.0	93.6	93.3	93.3	92.8	92.7
Smart handheld devices	92.0	94.6	95.5	96.7	97.6	98.1
Other add-ons	86.5	83.6	82.1	80.5	80.6	78.3
Peripherals total	92.4	92.2	92.1	92.5	92.7	93.1
Networking equipment	96.0	95.8	95.8	95.9	96.0	96.1
Hardware total	93.5	93.4	93.6	93.8	93.8	94.0
Packaged software total	95.5	95.6	95.7	95.8	96.0	96.1
Services total	94.0	94.1	94.1	94.2	94.3	94.4
Total IT	94.2	94.2	94.3	94.4	94.6	94.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 128

UNITED STATES PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	47.9	47.4	46.9	46.4	45.8	45.1
Implementation	43.8	43.3	43.0	42.7	42.3	41.9
Maintenance and support	46.5	47.4	48.2	48.9	49.4	49.7
Operations	46.8	47.1	47.5	47.5	47.1	46.7
IT training and education	44.4	43.5	42.7	41.9	41.8	42.0
Services total	45.5	45.6	45.6	45.7	45.5	45.3
Packaged software						
System infrastructure software	41.2	40.5	39.6	39.3	39.4	39.5
Appl. development and deployment	47.7	47.6	47.2	46.9	46.8	46.7
Applications	51.5	51.4	51.1	50.9	50.6	49.9
Packaged software total	47.9	47.5	47.1	46.8	46.6	46.3
Hardware						
Systems						
High-end enterprise servers	32.6	29.7	29.6	31.6	33.9	35.4
Midrange enterprise servers	32.6	36.1	35.5	34.8	34.8	35.6
Volume servers	40.3	43.9	44.3	43.3	42.6	41.6
Servers total	35.9	38.1	38.4	38.3	38.7	38.7
Personal computers	32.9	31.3	31.1	30.0	28.2	26.0
Traditional workstations	40.2	29.5	21.9	16.1	12.1	8.9
Clients total	33.0	31.2	31.0	29.9	28.1	25.9
Systems total	33.7	32.9	32.8	32.0	30.7	29.1
Storage						
Disk systems	36.8	37.1	36.7	36.2	35.9	35.6
Tape automation	41.7	42.6	43.0	43.2	43.9	44.7
Storage total	37.4	37.8	37.4	37.1	36.9	36.8
Peripherals						
Printers and MFPs	41.1	39.0	36.8	35.0	33.6	32.6
Smart handheld devices	36.8	35.7	30.0	29.8	31.5	34.3
Other add-ons	32.5	29.7	27.5	25.0	25.0	22.0
Peripherals total	38.8	36.8	33.7	32.1	31.7	31.8
Networking equipment	45.4	44.3	43.7	42.8	42.3	42.3
Hardware total	36.6	35.7	34.9	34.0	33.2	32.4
Packaged software total	47.9	47.5	47.1	46.8	46.6	46.3
Services total	45.5	45.6	45.6	45.7	45.5	45.3
Total IT	42.5	42.2	41.8	41.4	41.1	40.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

WESTERN EUROPE

Downbeat economic forecasts, frozen corporate budgets, and continued price erosion are the chief factors that have steered IDC to lower its expectations for IT spending in Western Europe in 2003. New data foresees a scenario whereby total IT growth will not exceed 0.5% this year, which despite being more positive than the 2002 decline of 5.2%, assumes that business conditions will see little, if any, improvement in the second half of 2003. A return to expansion remains on the cards from 2004 onward, with modest growth expectations of 3.8% and 6.1% in 2004 and 2005, respectively.

Downbeat economic forecasts, frozen corporate budgets, and continued price erosion are the chief factors that have steered IDC to lower its expectations for IT spending in Western Europe in 2003.

The new data highlights a stark contrast in the strength of various sectors in the Western European IT industry. At one end of the scale, spending on smart handheld devices will experience rapid growth this year and is expected to rise by a massive 79% owing to the surge in mobile communications and the flood of new converged devices on the market. Also pegged for robust growth this year is investment in MFPs, which are forecast to rise by 27% in 2003. At the opposite end of the spectrum, standard printer sales are set to suffer from the high uptake of MFPs, declining this year by 3% and remaining more or less flat for the remainder of the forecast period. Also low on the priority list this year is investment in storage systems, notably tape libraries.

Despite stronger-than-anticipated first-quarter results, the outlook for the Western European PC market remains fragile and IDC predicts only a limited market rebound overall. The current economic climate is continuing to affect business sales and cautious attitudes prevail in the corporate space, where only essential upgrades are taking place. The small and medium-sized business (SMB) market, which has so far proved more resilient to economic uncertainty, will continue to display healthy buying patterns across all form factors in the second half of 2003 and remain the focal point for all vendors, despite being primarily driven by attractive pricing. On the consumer side, lower pricing and stark competition in the retail channel are fueling interest in notebook sales and will continue to drive consumer growth. All customer segments are experiencing a shift in demand toward portable PCs, a trend that IDC has reflected by revising its forecasts for notebook upward and desktop downward.

Despite stronger-than-anticipated first-quarter results, the outlook for the Western European PC market remains fragile and IDC predicts only a limited market rebound overall.

Similarly, in the server space, the outlook is mildly positive: Sales showed an increase of 8.9% over the previous year in terms of units shipped in the first quarter of 2003. However, total customer spending actually declined, as did the average value of servers sold. The average price of servers sold now stands at $11,000, approximately 10% lower than the first quarter of 2002, which illustrates the ongoing trend toward lower-priced machines and explains why the value of the total server market is falling.

Results for major services providers in Europe suggest that a number of inhibitors to IT services spending that were visible in the past have yet to dissipate. Most vendors reported a challenging economic environment and difficult market conditions, with increased pricing pressure stemming not only from tough competition but also from cost-conscious clients. The consulting and systems integration markets remain largely depressed due to the continuing global economic recession and the lack of a new wave of technology to stimulate spending. Clients continue to reduce or defer spending on consulting services, while overcapacity and pricing pressure are heavily impacting vendors' consulting revenue. Large software vendors, such as Oracle and SAP, are experiencing lower software license sales, reflecting reduced enterprise software spending, which has in turn adversely impacted their revenue for related consulting, training, and support services. In contrast, outsourcing and managed services revenue has continued to increase for most IT services vendors as clients attempt to reduce costs by focusing on core operations in response to the difficult economic environment.

Results for major services providers in Europe suggest that a number of inhibitors to IT services spending that were visible in the past have yet to dissipate.

The Western European software market remains mostly subdued, with key vendors reporting little movement in activity. Based on the assumption that this scenario will continue into the second half of 2003, IDC revised its short-range software spending forecasts downward. The reasons for the shrinking software revenue are twofold: The slowdown of the global economy has clearly had a detrimental effect on the software industry over the past years. But this is not the only force at work here. The Western European software industry has entered a complexity crisis that would have undermined spending irrespective of the economy's health. Both corporate and IT strategies have become increasingly focused on reducing short-term costs, and almost all available resources are being consumed by the maintenance and extension of existing software assets. Often, business process integration means removing costs from legacy processes that have been customized into ERP suites. Complexity has accelerated the need for further investments in strategic and cost-saving integration software.

The Western European software market remains mostly subdued, with key vendors reporting little movement in activity.

Given the decline in price points and the dearth of affluent, untapped markets, the days of double-digit aggregate growth are over. The list of new enterprises left to penetrate with integrated suite megadeals is slim. Although the abundance of SMBs in Europe represents an opportunity for software vendors going forward, even these companies will be looking to buy at a lower price point. As such, when demand resumes in the European software market, growth will remain in the single digits.

Tables 129–212 illustrate IT spending forecasts for Western Europe, with country-level detail for Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.

TABLE 129

IT SPENDING IN WESTERN EUROPE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	10,560.5	10,545.2	10,721.3	11,177.1	11,928.9	12,703.8
Implementation	42,612.2	42,643.1	43,254.3	44,898.2	47,663.5	50,623.9
Maintenance and support	29,663.1	30,027.0	30,432.9	31,539.5	33,344.6	35,290.1
Operations	19,912.4	20,841.5	21,756.2	23,165.4	25,012.3	26,799.5
IT training and education	7,653.0	7,563.8	7,546.8	7,678.3	8,024.2	8,285.1
Services total	110,401.3	111,620.6	113,711.5	118,458.6	125,973.5	133,702.4
Packaged software						
System infrastructure software	14,726.7	15,517.5	16,562.1	17,756.3	19,020.1	20,484.5
Appl. development and deployment	11,919.0	12,240.0	12,858.4	13,739.2	14,881.2	16,133.4
Applications	26,486.9	26,926.5	28,053.6	29,888.1	32,037.9	34,138.3
Packaged software total	53,132.6	54,684.0	57,474.1	61,383.7	65,939.2	70,756.2
Hardware						
Systems						
High-end enterprise servers	3,949.0	3,407.3	3,396.5	3,230.3	3,062.4	2,989.4
Midrange enterprise servers	4,091.2	3,408.9	3,455.6	3,792.4	3,808.4	3,973.8
Volume servers	5,312.2	4,743.5	5,020.0	5,515.7	6,121.1	6,277.7
Servers total	13,352.4	11,559.7	11,872.1	12,538.4	12,991.9	13,240.9
Personal computers	42,524.0	40,304.3	39,278.2	40,027.9	40,191.6	41,703.5
Traditional workstations	661.5	569.9	457.2	380.8	322.1	280.6
Clients total	43,185.4	40,874.2	39,735.3	40,408.6	40,513.8	41,984.1
Systems total	56,537.8	52,433.9	51,607.4	52,947.0	53,505.7	55,225.1
Storage						
Disk systems	6,467.0	6,227.6	6,148.7	6,333.6	6,512.9	6,682.3
Tape automation	478.0	427.4	425.8	429.8	433.5	443.2
Storage total	6,945.0	6,655.0	6,574.5	6,763.4	6,946.4	7,125.5
Peripherals						
Printers and MFPs	11,500.3	12,695.5	13,957.9	14,996.2	15,956.1	16,532.3
Smart handheld devices	2,554.0	4,580.1	8,560.0	12,405.6	15,492.5	17,705.7
Other add-ons	3,168.5	2,896.0	2,739.6	2,703.3	2,621.4	2,625.8
Peripherals total	17,222.7	20,171.6	25,257.6	30,105.1	34,069.9	36,863.8
Networking equipment	12,634.3	12,650.7	13,319.1	14,700.0	16,232.9	17,591.9
Hardware total	93,339.8	91,911.2	96,758.6	104,515.4	110,754.9	116,806.2
Packaged software total	53,132.6	54,684.0	57,474.1	61,383.7	65,939.2	70,756.2
Services total	110,401.3	111,620.6	113,711.5	118,458.6	125,973.5	133,702.4
Total IT	256,873.7	258,215.8	267,944.1	284,357.7	302,667.6	321,264.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 130

GROWTH IN IT SPENDING IN WESTERN EUROPE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-0.1	1.7	4.3	6.7	6.5	4.8
Implementation	0.1	1.4	3.8	6.2	6.2	4.4
Maintenance and support	1.2	1.4	3.6	5.7	5.8	4.1
Operations	4.7	4.4	6.5	8.0	7.1	6.5
IT training and education	-1.2	-0.2	1.7	4.5	3.3	2.3
Services total	1.1	1.9	4.2	6.3	6.1	4.6
Packaged software						
System infrastructure software	5.4	6.7	7.2	7.1	7.7	7.2
Appl. development and deployment	2.7	5.1	6.8	8.3	8.4	7.1
Applications	1.7	4.2	6.5	7.2	6.6	6.1
Packaged software total	2.9	5.1	6.8	7.4	7.3	6.7
Hardware						
Systems						
High-end enterprise servers	-13.7	-0.3	-4.9	-5.2	-2.4	-3.2
Midrange enterprise servers	-16.7	1.4	9.7	0.4	4.3	3.9
Volume servers	-10.7	5.8	9.9	11.0	2.6	7.3
Servers total	-13.4	2.7	5.6	3.6	1.9	3.5
Personal computers	-5.2	-2.5	1.9	0.4	3.8	0.9
Traditional workstations	-13.8	-19.8	-16.7	-15.4	-12.9	-16.2
Clients total	-5.2	-2.5	1.9	0.4	3.8	0.9
Systems total	-7.3	-1.6	2.6	1.1	3.2	1.3
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-10.6	-0.4	0.9	0.9	2.2	0.9
Storage total	-4.2	-1.2	2.9	2.7	2.6	1.7
Peripherals						
Printers and MFPs	10.4	9.9	7.4	6.4	3.6	6.8
Smart handheld devices	79.3	86.9	44.9	24.9	14.3	40.2
Other add-ons	-8.6	-5.4	-1.3	-3.0	0.2	-2.4
Peripherals total	17.1	25.2	19.2	13.2	8.2	16.3
Networking equipment	0.1	5.3	10.4	10.4	8.4	8.6
Hardware total	-1.5	5.3	8.0	6.0	5.5	6.2
Packaged software total	2.9	5.1	6.8	7.4	7.3	6.7
Services total	1.1	1.9	4.2	6.3	6.1	4.6
Total IT	0.5	3.8	6.1	6.4	6.1	5.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 131

PROPORTIONS OF IT SPENDING CATEGORIES IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.1	4.1	4.0	3.9	3.9	4.0
Implementation	16.6	16.5	16.1	15.8	15.7	15.8
Maintenance and support	11.5	11.6	11.4	11.1	11.0	11.0
Operations	7.8	8.1	8.1	8.1	8.3	8.3
IT training and education	3.0	2.9	2.8	2.7	2.7	2.6
Services total	43.0	43.2	42.4	41.7	41.6	41.6
Packaged software						
System infrastructure software	5.7	6.0	6.2	6.2	6.3	6.4
Appl. development and deployment	4.6	4.7	4.8	4.8	4.9	5.0
Applications	10.3	10.4	10.5	10.5	10.6	10.6
Packaged software total	20.7	21.2	21.5	21.6	21.8	22.0
Hardware						
Systems						
High-end enterprise servers	1.5	1.3	1.3	1.1	1.0	0.9
Midrange enterprise servers	1.6	1.3	1.3	1.3	1.3	1.2
Volume servers	2.1	1.8	1.9	1.9	2.0	2.0
Servers total	5.2	4.5	4.4	4.4	4.3	4.1
Personal computers	16.6	15.6	14.7	14.1	13.3	13.0
Traditional workstations	0.3	0.2	0.2	0.1	0.1	0.1
Clients total	16.6	15.6	14.7	14.1	13.3	13.0
Systems total	22.0	20.3	19.3	18.6	17.7	17.2
Storage						
Disk systems	2.5	2.4	2.3	2.2	2.2	2.1
Tape automation	0.2	0.2	0.2	0.2	0.1	0.1
Storage total	2.7	2.6	2.5	2.4	2.3	2.2
Peripherals						
Printers and MFPs	4.5	4.9	5.2	5.3	5.3	5.1
Smart handheld devices	1.0	1.8	3.2	4.4	5.1	5.5
Other add-ons	1.2	1.1	1.0	1.0	0.9	0.8
Peripherals total	6.7	7.8	9.4	10.6	11.3	11.5
Networking equipment	4.9	4.9	5.0	5.2	5.4	5.5
Hardware total	36.3	35.6	36.1	36.8	36.6	36.4
Packaged software total	20.7	21.2	21.5	21.6	21.8	22.0
Services total	43.0	43.2	42.4	41.7	41.6	41.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 132

WESTERN EUROPE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	28.5	28.5	28.0	27.8	27.8	27.8
Implementation	31.9	31.8	31.1	30.6	30.4	30.3
Maintenance and support	32.1	31.4	30.4	29.6	29.1	28.6
Operations	30.4	30.0	29.3	29.0	29.0	28.8
IT training and education	35.3	35.3	34.8	34.2	33.6	32.6
Services total	31.5	31.2	30.5	29.9	29.7	29.4
Packaged software						
System infrastructure software	32.3	32.6	32.7	32.5	32.2	32.1
Appl. development and deployment	30.5	30.4	30.4	30.2	30.1	30.1
Applications	30.8	30.5	30.2	30.1	30.0	30.1
Packaged software total	31.1	31.0	30.9	30.8	30.6	30.6
Hardware						
Systems						
High-end enterprise servers	29.6	28.8	29.6	28.8	27.4	27.3
Midrange enterprise servers	27.7	25.3	24.6	25.9	25.8	25.4
Volume servers	25.2	21.6	20.9	21.4	21.9	21.4
Servers total	27.1	24.5	24.0	24.3	24.1	23.7
Personal computers	27.5	27.4	26.1	25.6	25.1	25.3
Traditional workstations	28.1	34.0	35.5	36.3	36.7	36.0
Clients total	27.5	27.5	26.2	25.6	25.1	25.4
Systems total	27.4	26.8	25.6	25.3	24.9	25.0
Storage						
Disk systems	30.0	29.5	28.8	28.5	28.2	28.0
Tape automation	16.3	14.5	14.0	13.5	13.0	12.5
Storage total	28.3	27.7	26.9	26.6	26.3	26.0
Peripherals						
Printers and MFPs	28.0	29.4	31.1	32.1	33.0	33.3
Smart handheld devices	34.2	41.8	51.3	53.7	52.8	49.8
Other add-ons	24.9	25.0	23.4	22.4	20.6	20.1
Peripherals total	28.1	30.7	34.4	36.8	37.7	37.5
Networking equipment	25.1	25.6	25.6	26.1	26.2	26.0
Hardware total	27.3	27.4	27.6	28.0	28.1	28.2
Packaged software total	31.1	31.0	30.9	30.8	30.6	30.6
Services total	31.5	31.2	30.5	29.9	29.7	29.4
Total IT	29.8	29.7	29.4	29.4	29.3	29.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 133

IT SPENDING IN AUSTRIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	247.2	258.2	276.6	297.3	321.6	342.3
Implementation	1,126.2	1,173.0	1,248.4	1,329.2	1,415.1	1,500.7
Maintenance and support	649.1	684.3	734.1	787.7	840.0	895.6
Operations	346.5	379.4	412.4	450.6	489.0	528.6
IT training and education	141.1	150.6	161.5	173.1	185.5	197.9
Services total	2,510.0	2,645.5	2,833.0	3,037.9	3,251.1	3,465.2
Packaged software						
System infrastructure software	328.7	336.7	355.9	382.0	412.5	443.3
Appl. development and deployment	269.7	274.2	286.2	302.0	323.8	349.7
Applications	570.6	580.9	604.7	641.6	688.1	735.4
Packaged software total	1,169.0	1,191.8	1,246.8	1,325.6	1,424.4	1,528.4
Hardware						
Systems						
High-end enterprise servers	78.8	56.0	55.9	50.1	47.1	45.7
Midrange enterprise servers	99.0	84.6	85.8	95.0	95.8	100.1
Volume servers	138.0	118.8	121.1	130.1	141.4	142.1
Servers total	315.8	259.4	262.8	275.1	284.2	287.9
Personal computers	960.3	908.6	879.4	905.9	925.2	972.1
Traditional workstations	12.4	15.8	7.8	6.5	5.4	4.7
Clients total	972.6	924.5	887.2	912.4	930.6	976.8
Systems total	1,288.4	1,183.9	1,150.0	1,187.5	1,214.8	1,264.6
Storage						
Disk systems	151.8	146.2	144.3	148.7	152.9	156.8
Tape automation	6.8	4.1	3.9	3.8	3.6	3.6
Storage total	158.5	150.3	148.3	152.5	156.4	160.5
Peripherals						
Printers and MFPs	283.2	373.4	426.2	468.0	504.6	528.1
Smart handheld devices	53.2	95.2	172.9	243.3	298.1	342.7
Other add-ons	67.2	64.2	61.2	61.1	60.5	61.7
Peripherals total	403.6	532.8	660.3	772.5	863.1	932.5
Networking equipment	259.8	265.5	276.1	303.8	336.7	365.9
Hardware total	2,110.3	2,132.4	2,234.7	2,416.2	2,571.2	2,723.5
Packaged software total	1,169.0	1,191.8	1,246.8	1,325.6	1,424.4	1,528.4
Services total	2,510.0	2,645.5	2,833.0	3,037.9	3,251.1	3,465.2
Total IT	5,789.3	5,969.7	6,314.5	6,779.7	7,246.7	7,717.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 134

GROWTH IN IT SPENDING IN AUSTRIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	4.4	7.1	7.5	8.2	6.4	7.3
Implementation	4.2	6.4	6.5	6.5	6.1	6.4
Maintenance and support	5.4	7.3	7.3	6.6	6.6	7.0
Operations	9.5	8.7	9.3	8.5	8.1	8.6
IT training and education	6.7	7.2	7.2	7.2	6.7	7.1
Services total	5.4	7.1	7.2	7.0	6.6	7.0
Packaged software						
System infrastructure software	2.4	5.7	7.3	8.0	7.5	7.1
Appl. development and deployment	1.7	4.4	5.5	7.2	8.0	6.3
Applications	1.8	4.1	6.1	7.2	6.9	6.1
Packaged software total	1.9	4.6	6.3	7.5	7.3	6.4
Hardware						
Systems						
High-end enterprise servers	-29.0	-0.1	-10.4	-6.0	-2.9	-4.9
Midrange enterprise servers	-14.5	1.4	10.7	0.9	4.5	4.3
Volume servers	-13.9	1.9	7.4	8.7	0.5	4.6
Servers total	-17.8	1.3	4.7	3.3	1.3	2.6
Personal computers	-5.4	-3.2	3.0	2.1	5.1	1.7
Traditional workstations	28.1	-50.8	-17.2	-15.9	-13.4	-26.2
Clients total	-5.4	-3.2	3.0	2.1	5.1	1.7
Systems total	-8.1	-2.9	3.3	2.3	4.1	1.7
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-39.4	-3.7	-2.7	-6.6	1.4	-2.9
Storage total	-5.2	-1.3	2.9	2.6	2.6	1.7
Peripherals						
Printers and MFPs	31.9	14.1	9.8	7.8	4.7	9.1
Smart handheld devices	79.1	81.7	40.7	22.5	15.0	37.7
Other add-ons	-4.6	-4.7	-0.1	-1.0	1.9	-1.0
Peripherals total	32.0	23.9	17.0	11.7	8.0	15.0
Networking equipment	2.2	4.0	10.0	10.9	8.7	8.4
Hardware total	1.0	4.8	8.1	6.4	5.9	6.3
Packaged software total	1.9	4.6	6.3	7.5	7.3	6.4
Services total	5.4	7.1	7.2	7.0	6.6	7.0
Total IT	3.1	5.8	7.4	6.9	6.5	6.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 135

PROPORTIONS OF IT SPENDING CATEGORIES IN AUSTRIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.3	4.4	4.4	4.4	4.4
Implementation	19.5	19.6	19.8	19.6	19.5	19.4
Maintenance and support	11.2	11.5	11.6	11.6	11.6	11.6
Operations	6.0	6.4	6.5	6.6	6.7	6.9
IT training and education	2.4	2.5	2.6	2.6	2.6	2.6
Services total	43.4	44.3	44.9	44.8	44.9	44.9
Packaged software						
System infrastructure software	5.7	5.6	5.6	5.6	5.7	5.7
Appl. development and deployment	4.7	4.6	4.5	4.5	4.5	4.5
Applications	9.9	9.7	9.6	9.5	9.5	9.5
Packaged software total	20.2	20.0	19.7	19.6	19.7	19.8
Hardware						
Systems						
High-end enterprise servers	1.4	0.9	0.9	0.7	0.6	0.6
Midrange enterprise servers	1.7	1.4	1.4	1.4	1.3	1.3
Volume servers	2.4	2.0	1.9	1.9	2.0	1.8
Servers total	5.5	4.3	4.2	4.1	3.9	3.7
Personal computers	16.6	15.2	13.9	13.4	12.8	12.6
Traditional workstations	0.2	0.3	0.1	0.1	0.1	0.1
Clients total	16.6	15.2	13.9	13.4	12.8	12.6
Systems total	22.3	19.8	18.2	17.5	16.8	16.4
Storage						
Disk systems	2.6	2.4	2.3	2.2	2.1	2.0
Tape automation	0.1	0.1	0.1	0.1	0.0	0.0
Storage total	2.7	2.5	2.3	2.2	2.2	2.1
Peripherals						
Printers and MFPs	4.9	6.3	6.7	6.9	7.0	6.8
Smart handheld devices	0.9	1.6	2.7	3.6	4.1	4.4
Other add-ons	1.2	1.1	1.0	0.9	0.8	0.8
Peripherals total	7.0	8.9	10.5	11.4	11.9	12.1
Networking equipment	4.5	4.4	4.4	4.5	4.6	4.7
Hardware total	36.5	35.7	35.4	35.6	35.5	35.3
Packaged software total	20.2	20.0	19.7	19.6	19.7	19.8
Services total	43.4	44.3	44.9	44.8	44.9	44.9
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 136

AUSTRIA PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.4	2.6	2.7	2.7	2.7
Implementation	2.6	2.8	2.9	3.0	3.0	3.0
Maintenance and support	2.2	2.3	2.4	2.5	2.5	2.5
Operations	1.7	1.8	1.9	1.9	2.0	2.0
IT training and education	1.8	2.0	2.1	2.3	2.3	2.4
Services total	2.3	2.4	2.5	2.6	2.6	2.6
Packaged software						
System infrastructure software	2.2	2.2	2.1	2.2	2.2	2.2
Appl. development and deployment	2.3	2.2	2.2	2.2	2.2	2.2
Applications	2.2	2.2	2.2	2.1	2.1	2.2
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Hardware						
Systems						
High-end enterprise servers	2.0	1.6	1.6	1.6	1.5	1.5
Midrange enterprise servers	2.4	2.5	2.5	2.5	2.5	2.5
Volume servers	2.6	2.5	2.4	2.4	2.3	2.3
Servers total	2.4	2.2	2.2	2.2	2.2	2.2
Personal computers	2.3	2.3	2.2	2.3	2.3	2.3
Traditional workstations	1.9	2.8	1.7	1.7	1.7	1.7
Clients total	2.3	2.3	2.2	2.3	2.3	2.3
Systems total	2.3	2.3	2.2	2.2	2.3	2.3
Storage						
Disk systems	2.3	2.3	2.3	2.3	2.3	2.3
Tape automation	1.4	1.0	0.9	0.9	0.8	0.8
Storage total	2.3	2.3	2.3	2.3	2.3	2.3
Peripherals						
Printers and MFPs	2.5	2.9	3.1	3.1	3.2	3.2
Smart handheld devices	2.1	2.1	2.0	2.0	1.9	1.9
Other add-ons	2.1	2.2	2.2	2.3	2.3	2.3
Peripherals total	2.3	2.6	2.6	2.6	2.5	2.5
Networking equipment	2.1	2.1	2.1	2.1	2.1	2.1
Hardware total	2.3	2.3	2.3	2.3	2.3	2.3
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Services total	2.3	2.4	2.5	2.6	2.6	2.6
Total IT	2.3	2.3	2.4	2.4	2.4	2.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 137

AUSTRIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.7	0.7	0.7	0.7	0.7	0.7
Implementation	0.8	0.9	0.9	0.9	0.9	0.9
Maintenance and support	0.7	0.7	0.7	0.7	0.7	0.7
Operations	0.5	0.5	0.6	0.6	0.6	0.6
IT training and education	0.7	0.7	0.7	0.8	0.8	0.8
Services total	0.7	0.7	0.8	0.8	0.8	0.8
Packaged software						
System infrastructure software	0.7	0.7	0.7	0.7	0.7	0.7
Appl. development and deployment	0.7	0.7	0.7	0.7	0.7	0.7
Applications	0.7	0.7	0.7	0.6	0.6	0.6
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.6	0.5	0.5	0.4	0.4	0.4
Midrange enterprise servers	0.7	0.6	0.6	0.6	0.6	0.6
Volume servers	0.7	0.5	0.5	0.5	0.5	0.5
Servers total	0.6	0.5	0.5	0.5	0.5	0.5
Personal computers	0.6	0.6	0.6	0.6	0.6	0.6
Traditional workstations	0.5	0.9	0.6	0.6	0.6	0.6
Clients total	0.6	0.6	0.6	0.6	0.6	0.6
Systems total	0.6	0.6	0.6	0.6	0.6	0.6
Storage						
Disk systems	0.7	0.7	0.7	0.7	0.7	0.7
Tape automation	0.2	0.1	0.1	0.1	0.1	0.1
Storage total	0.6	0.6	0.6	0.6	0.6	0.6
Peripherals						
Printers and MFPs	0.7	0.9	0.9	1.0	1.0	1.1
Smart handheld devices	0.7	0.9	1.0	1.1	1.0	1.0
Other add-ons	0.5	0.6	0.5	0.5	0.5	0.5
Peripherals total	0.7	0.8	0.9	0.9	1.0	0.9
Networking equipment	0.5	0.5	0.5	0.5	0.5	0.5
Hardware total	0.6	0.6	0.6	0.6	0.7	0.7
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Services total	0.7	0.7	0.8	0.8	0.8	0.8
Total IT	0.7	0.7	0.7	0.7	0.7	0.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 138

IT SPENDING IN BELGIUM, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	268.3	270.0	280.0	296.0	317.4	341.2
Implementation	1,105.2	1,118.9	1,155.6	1,215.9	1,292.9	1,384.5
Maintenance and support	849.6	879.2	917.0	968.6	1,041.0	1,112.0
Operations	487.5	511.7	538.2	581.0	635.8	681.0
IT training and education	319.6	316.7	327.9	345.1	370.0	382.0
Services total	3,030.2	3,096.6	3,218.7	3,406.6	3,657.1	3,900.7
Packaged software						
System infrastructure software	494.1	517.6	544.0	580.4	620.0	663.8
Appl. development and deployment	365.5	374.5	391.4	419.2	453.4	491.6
Applications	817.3	832.1	871.1	924.0	993.1	1,061.3
Packaged software total	1,676.9	1,724.2	1,806.5	1,923.7	2,066.4	2,216.8
Hardware						
Systems						
High-end enterprise servers	90.2	74.9	75.8	70.5	66.2	67.2
Midrange enterprise servers	167.2	115.9	113.3	118.8	114.0	112.7
Volume servers	185.0	157.7	156.7	167.1	183.9	184.5
Servers total	442.3	348.5	345.8	356.4	364.1	364.4
Personal computers	1,040.4	1,016.4	965.2	987.7	986.1	1,005.1
Traditional workstations	11.2	10.1	6.4	5.3	4.5	3.9
Clients total	1,051.6	1,026.5	971.7	993.0	990.6	1,009.0
Systems total	1,493.9	1,375.0	1,317.4	1,349.4	1,354.7	1,373.4
Storage						
Disk systems	220.8	212.6	210.0	216.3	222.4	228.2
Tape automation	8.2	5.2	4.9	4.6	5.4	5.5
Storage total	229.0	217.8	214.8	220.9	227.8	233.7
Peripherals						
Printers and MFPs	394.2	421.6	466.8	506.1	540.9	555.1
Smart handheld devices	61.5	123.3	234.2	317.6	379.2	432.1
Other add-ons	85.2	77.7	73.6	72.6	70.0	68.8
Peripherals total	540.9	622.6	774.5	896.3	990.0	1,056.0
Networking equipment	394.7	377.6	383.6	417.7	468.0	507.4
Hardware total	2,658.5	2,593.0	2,690.4	2,884.3	3,040.5	3,170.5
Packaged software total	1,676.9	1,724.2	1,806.5	1,923.7	2,066.4	2,216.8
Services total	3,030.2	3,096.6	3,218.7	3,406.6	3,657.1	3,900.7
Total IT	7,365.5	7,413.7	7,715.6	8,214.6	8,764.0	9,288.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 139

GROWTH IN IT SPENDING IN BELGIUM, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	0.6	3.7	5.7	7.2	7.5	6.0
Implementation	1.2	3.3	5.2	6.3	7.1	5.5
Maintenance and support	3.5	4.3	5.6	7.5	6.8	6.0
Operations	5.0	5.2	8.0	9.4	7.1	7.4
IT training and education	-0.9	3.5	5.2	7.2	3.3	4.8
Services total	2.2	3.9	5.8	7.4	6.7	5.9
Packaged software						
System infrastructure software	4.8	5.1	6.7	6.8	7.1	6.4
Appl. development and deployment	2.5	4.5	7.1	8.1	8.4	7.0
Applications	1.8	4.7	6.1	7.5	6.9	6.3
Packaged software total	2.8	4.8	6.5	7.4	7.3	6.5
Hardware						
Systems						
High-end enterprise servers	-16.9	1.2	-6.9	-6.2	1.6	-2.7
Midrange enterprise servers	-30.7	-2.3	4.9	-4.0	-1.2	-0.7
Volume servers	-14.8	-0.6	6.6	10.1	0.3	4.0
Servers total	-21.2	-0.8	3.1	2.1	0.1	1.1
Personal computers	-2.3	-5.0	2.3	-0.2	1.9	-0.3
Traditional workstations	-9.8	-36.4	-17.3	-16.0	-13.5	-21.4
Clients total	-2.3	-5.0	2.3	-0.2	1.9	-0.3
Systems total	-8.0	-4.2	2.4	0.4	1.4	0.0
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-36.7	-5.9	-4.8	17.5	1.9	1.8
Storage total	-4.9	-1.4	2.8	3.1	2.6	1.8
Peripherals						
Printers and MFPs	7.0	10.7	8.4	6.9	2.6	7.1
Smart handheld devices	100.4	90.0	35.6	19.4	14.0	36.8
Other add-ons	-8.9	-5.3	-1.3	-3.6	-1.7	-3.0
Peripherals total	15.1	24.4	15.7	10.5	6.7	14.1
Networking equipment	-4.3	1.6	8.9	12.0	8.4	7.7
Hardware total	-2.5	3.8	7.2	5.4	4.3	5.2
Packaged software total	2.8	4.8	6.5	7.4	7.3	6.5
Services total	2.2	3.9	5.8	7.4	6.7	5.9
Total IT	0.7	4.1	6.5	6.7	6.0	5.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 140

PROPORTIONS OF IT SPENDING CATEGORIES IN BELGIUM, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.6	3.6	3.6	3.6	3.6	3.7
Implementation	15.0	15.1	15.0	14.8	14.8	14.9
Maintenance and support	11.5	11.9	11.9	11.8	11.9	12.0
Operations	6.6	6.9	7.0	7.1	7.3	7.3
IT training and education	4.3	4.3	4.3	4.2	4.2	4.1
Services total	41.1	41.8	41.7	41.5	41.7	42.0
Packaged software						
System infrastructure software	6.7	7.0	7.1	7.1	7.1	7.1
Appl. development and deployment	5.0	5.1	5.1	5.1	5.2	5.3
Applications	11.1	11.2	11.3	11.2	11.3	11.4
Packaged software total	22.8	23.3	23.4	23.4	23.6	23.9
Hardware						
Systems						
High-end enterprise servers	1.2	1.0	1.0	0.9	0.8	0.7
Midrange enterprise servers	2.3	1.6	1.5	1.4	1.3	1.2
Volume servers	2.5	2.1	2.0	2.0	2.1	2.0
Servers total	6.0	4.7	4.5	4.3	4.2	3.9
Personal computers	14.1	13.7	12.5	12.0	11.3	10.8
Traditional workstations	0.2	0.1	0.1	0.1	0.1	0.0
Clients total	14.1	13.7	12.5	12.0	11.3	10.8
Systems total	20.3	18.5	17.1	16.4	15.5	14.8
Storage						
Disk systems	3.0	2.9	2.7	2.6	2.5	2.5
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	3.1	2.9	2.8	2.7	2.6	2.5
Peripherals						
Printers and MFPs	5.4	5.7	6.0	6.2	6.2	6.0
Smart handheld devices	0.8	1.7	3.0	3.9	4.3	4.7
Other add-ons	1.2	1.0	1.0	0.9	0.8	0.7
Peripherals total	7.3	8.4	10.0	10.9	11.3	11.4
Networking equipment	5.4	5.1	5.0	5.1	5.3	5.5
Hardware total	36.1	35.0	34.9	35.1	34.7	34.1
Packaged software total	22.8	23.3	23.4	23.4	23.6	23.9
Services total	41.1	41.8	41.7	41.5	41.7	42.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 141

BELGIUM PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.5	2.6	2.6	2.6	2.7	2.7
Implementation	2.6	2.6	2.7	2.7	2.7	2.7
Maintenance and support	2.9	2.9	3.0	3.1	3.1	3.2
Operations	2.4	2.5	2.5	2.5	2.5	2.5
IT training and education	4.2	4.2	4.3	4.5	4.6	4.6
Services total	2.7	2.8	2.8	2.9	2.9	2.9
Packaged software						
System infrastructure software	3.4	3.3	3.3	3.3	3.3	3.2
Appl. development and deployment	3.1	3.1	3.0	3.1	3.0	3.0
Applications	3.1	3.1	3.1	3.1	3.1	3.1
Packaged software total	3.2	3.2	3.1	3.1	3.1	3.1
Hardware						
Systems						
High-end enterprise servers	2.3	2.2	2.2	2.2	2.2	2.2
Midrange enterprise servers	4.1	3.4	3.3	3.1	3.0	2.8
Volume servers	3.5	3.3	3.1	3.0	3.0	2.9
Servers total	3.3	3.0	2.9	2.8	2.8	2.8
Personal computers	2.4	2.5	2.5	2.5	2.5	2.4
Traditional workstations	1.7	1.8	1.4	1.4	1.4	1.4
Clients total	2.4	2.5	2.4	2.5	2.4	2.4
Systems total	2.6	2.6	2.6	2.5	2.5	2.5
Storage						
Disk systems	3.4	3.4	3.4	3.4	3.4	3.4
Tape automation	1.7	1.2	1.1	1.1	1.3	1.3
Storage total	3.3	3.3	3.3	3.3	3.3	3.3
Peripherals						
Printers and MFPs	3.4	3.3	3.3	3.4	3.4	3.4
Smart handheld devices	2.4	2.7	2.7	2.6	2.4	2.4
Other add-ons	2.7	2.7	2.7	2.7	2.7	2.6
Peripherals total	3.1	3.1	3.1	3.0	2.9	2.9
Networking equipment	3.1	3.0	2.9	2.8	2.9	2.9
Hardware total	2.8	2.8	2.8	2.8	2.7	2.7
Packaged software total	3.2	3.2	3.1	3.1	3.1	3.1
Services total	2.7	2.8	2.8	2.9	2.9	2.9
Total IT	2.9	2.9	2.9	2.9	2.9	2.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 142

BELGIUM PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.7	0.7	0.7	0.7	0.7	0.7
Implementation	0.8	0.8	0.8	0.8	0.8	0.8
Maintenance and support	0.9	0.9	0.9	0.9	0.9	0.9
Operations	0.7	0.7	0.7	0.7	0.7	0.7
IT training and education	1.5	1.5	1.5	1.5	1.5	1.5
Services total	0.9	0.9	0.9	0.9	0.9	0.9
Packaged software						
System infrastructure software	1.1	1.1	1.1	1.1	1.0	1.0
Appl. development and deployment	0.9	0.9	0.9	0.9	0.9	0.9
Applications	0.9	0.9	0.9	0.9	0.9	0.9
Packaged software total	1.0	1.0	1.0	1.0	1.0	1.0
Hardware						
Systems						
High-end enterprise servers	0.7	0.6	0.7	0.6	0.6	0.6
Midrange enterprise servers	1.1	0.9	0.8	0.8	0.8	0.7
Volume servers	0.9	0.7	0.7	0.6	0.7	0.6
Servers total	0.9	0.7	0.7	0.7	0.7	0.7
Personal computers	0.7	0.7	0.6	0.6	0.6	0.6
Traditional workstations	0.5	0.6	0.5	0.5	0.5	0.5
Clients total	0.7	0.7	0.6	0.6	0.6	0.6
Systems total	0.7	0.7	0.7	0.6	0.6	0.6
Storage						
Disk systems	1.0	1.0	1.0	1.0	1.0	1.0
Tape automation	0.3	0.2	0.2	0.1	0.2	0.2
Storage total	0.9	0.9	0.9	0.9	0.9	0.9
Peripherals						
Printers and MFPs	1.0	1.0	1.0	1.1	1.1	1.1
Smart handheld devices	0.8	1.1	1.4	1.4	1.3	1.2
Other add-ons	0.7	0.7	0.6	0.6	0.5	0.5
Peripherals total	0.9	0.9	1.1	1.1	1.1	1.1
Networking equipment	0.8	0.8	0.7	0.7	0.8	0.7
Hardware total	0.8	0.8	0.8	0.8	0.8	0.8
Packaged software total	1.0	1.0	1.0	1.0	1.0	1.0
Services total	0.9	0.9	0.9	0.9	0.9	0.9
Total IT	0.9	0.9	0.8	0.8	0.8	0.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 143

IT SPENDING IN DENMARK, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	229.6	226.4	235.6	248.1	261.1	273.6
Implementation	1,135.9	1,129.0	1,158.9	1,201.7	1,241.7	1,277.9
Maintenance and support	631.4	659.6	687.3	719.0	754.1	787.5
Operations	454.4	515.7	564.5	607.6	653.6	699.7
IT training and education	240.5	240.1	245.4	252.3	260.0	267.7
Services total	2,691.7	2,770.8	2,891.7	3,028.7	3,170.5	3,306.4
Packaged software						
System infrastructure software	301.4	314.2	335.4	359.1	386.1	411.4
Appl. development and deployment	295.9	308.3	324.9	346.0	370.9	401.9
Applications	579.3	588.0	617.6	659.7	702.9	746.3
Packaged software total	1,176.6	1,210.5	1,277.9	1,364.8	1,459.9	1,559.7
Hardware						
Systems						
High-end enterprise servers	52.0	49.2	54.2	50.6	48.0	48.1
Midrange enterprise servers	71.7	68.1	73.3	88.3	100.9	114.2
Volume servers	152.8	148.9	160.7	173.1	192.3	198.9
Servers total	276.5	266.1	288.2	312.0	341.2	361.2
Personal computers	909.2	898.6	893.4	853.8	819.7	795.2
Traditional workstations	8.9	4.2	5.1	4.2	3.6	3.1
Clients total	918.1	902.7	898.6	858.0	823.3	798.3
Systems total	1,194.7	1,168.9	1,186.8	1,170.0	1,164.5	1,159.5
Storage						
Disk systems	160.0	154.1	152.1	156.7	161.2	165.3
Tape automation	11.8	10.3	10.9	11.4	11.3	11.4
Storage total	171.8	164.4	163.0	168.1	172.5	176.7
Peripherals						
Printers and MFPs	290.0	312.7	356.0	388.0	416.9	444.2
Smart handheld devices	59.2	108.7	209.4	281.6	301.5	350.0
Other add-ons	66.5	65.2	61.6	56.3	51.7	47.9
Peripherals total	415.7	486.7	627.0	725.9	770.1	842.2
Networking equipment	436.7	422.7	440.9	477.5	487.7	533.2
Hardware total	2,218.8	2,242.7	2,417.7	2,541.5	2,594.8	2,711.6
Packaged software total	1,176.6	1,210.5	1,277.9	1,364.8	1,459.9	1,559.7
Services total	2,691.7	2,770.8	2,891.7	3,028.7	3,170.5	3,306.4
Total IT	6,087.1	6,224.0	6,587.2	6,935.0	7,225.2	7,577.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 144

GROWTH IN IT SPENDING IN DENMARK, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.4	4.1	5.3	5.2	4.8	4.8
Implementation	-0.6	2.6	3.7	3.3	2.9	3.1
Maintenance and support	4.5	4.2	4.6	4.9	4.4	4.5
Operations	13.5	9.5	7.6	7.6	7.1	7.9
IT training and education	-0.1	2.2	2.8	3.0	3.0	2.8
Services total	2.9	4.4	4.7	4.7	4.3	4.5
Packaged software						
System infrastructure software	4.2	6.8	7.1	7.5	6.5	7.0
Appl. development and deployment	4.2	5.4	6.5	7.2	8.4	6.9
Applications	1.5	5.0	6.8	6.6	6.2	6.1
Packaged software total	2.9	5.6	6.8	7.0	6.8	6.5
Hardware						
Systems						
High-end enterprise servers	-5.3	10.2	-6.7	-5.1	0.2	-0.6
Midrange enterprise servers	-5.1	7.7	20.4	14.3	13.2	13.8
Volume servers	-2.6	7.9	7.8	11.1	3.4	7.5
Servers total	-3.8	8.3	8.3	9.3	5.9	7.9
Personal computers	-1.2	-0.6	-4.4	-4.0	-3.0	-3.0
Traditional workstations	-53.4	23.6	-17.5	-16.2	-13.7	-7.3
Clients total	-1.2	-0.6	-4.4	-4.0	-3.0	-3.0
Systems total	-2.2	1.5	-1.4	-0.5	-0.4	-0.2
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-12.4	5.2	4.7	-0.3	0.4	2.5
Storage total	-4.3	-0.9	3.1	2.6	2.5	1.8
Peripherals						
Printers and MFPs	7.9	13.8	9.0	7.5	6.6	9.2
Smart handheld devices	83.6	92.6	34.5	7.1	16.1	33.9
Other add-ons	-1.9	-5.6	-8.6	-8.2	-7.3	-7.4
Peripherals total	17.1	28.8	15.8	6.1	9.4	14.7
Networking equipment	-3.2	4.3	8.3	2.2	9.3	6.0
Hardware total	1.1	7.8	5.1	2.1	4.5	4.9
Packaged software total	2.9	5.6	6.8	7.0	6.8	6.5
Services total	2.9	4.4	4.7	4.7	4.3	4.5
Total IT	2.2	5.8	5.3	4.2	4.9	5.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 145

PROPORTIONS OF IT SPENDING CATEGORIES IN DENMARK, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.8	3.6	3.6	3.6	3.6	3.6
Implementation	18.7	18.1	17.6	17.3	17.2	16.9
Maintenance and support	10.4	10.6	10.4	10.4	10.4	10.4
Operations	7.5	8.3	8.6	8.8	9.0	9.2
IT training and education	4.0	3.9	3.7	3.6	3.6	3.5
Services total	44.2	44.5	43.9	43.7	43.9	43.6
Packaged software						
System infrastructure software	5.0	5.0	5.1	5.2	5.3	5.4
Appl. development and deployment	4.9	5.0	4.9	5.0	5.1	5.3
Applications	9.5	9.4	9.4	9.5	9.7	9.8
Packaged software total	19.3	19.4	19.4	19.7	20.2	20.6
Hardware						
Systems						
High-end enterprise servers	0.9	0.8	0.8	0.7	0.7	0.6
Midrange enterprise servers	1.2	1.1	1.1	1.3	1.4	1.5
Volume servers	2.5	2.4	2.4	2.5	2.7	2.6
Servers total	4.5	4.3	4.4	4.5	4.7	4.8
Personal computers	14.9	14.4	13.6	12.3	11.3	10.5
Traditional workstations	0.1	0.1	0.1	0.1	0.0	0.0
Clients total	14.9	14.4	13.6	12.3	11.3	10.5
Systems total	19.6	18.8	18.0	16.9	16.1	15.3
Storage						
Disk systems	2.6	2.5	2.3	2.3	2.2	2.2
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	2.8	2.6	2.5	2.4	2.4	2.3
Peripherals						
Printers and MFPs	4.8	5.0	5.4	5.6	5.8	5.9
Smart handheld devices	1.0	1.7	3.2	4.1	4.2	4.6
Other add-ons	1.1	1.0	0.9	0.8	0.7	0.6
Peripherals total	6.8	7.8	9.5	10.5	10.7	11.1
Networking equipment	7.2	6.8	6.7	6.9	6.8	7.0
Hardware total	36.5	36.0	36.7	36.6	35.9	35.8
Packaged software total	19.3	19.4	19.4	19.7	20.2	20.6
Services total	44.2	44.5	43.9	43.7	43.9	43.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 146

DENMARK PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.1	2.2	2.2	2.2	2.2
Implementation	2.7	2.6	2.7	2.7	2.6	2.5
Maintenance and support	2.1	2.2	2.3	2.3	2.3	2.2
Operations	2.3	2.5	2.6	2.6	2.6	2.6
IT training and education	3.1	3.2	3.3	3.3	3.2	3.2
Services total	2.4	2.5	2.5	2.6	2.5	2.5
Packaged software						
System infrastructure software	2.0	2.0	2.0	2.0	2.0	2.0
Appl. development and deployment	2.5	2.5	2.5	2.5	2.5	2.5
Applications	2.2	2.2	2.2	2.2	2.2	2.2
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Hardware						
Systems						
High-end enterprise servers	1.3	1.4	1.6	1.6	1.6	1.6
Midrange enterprise servers	1.8	2.0	2.1	2.3	2.6	2.9
Volume servers	2.9	3.1	3.2	3.1	3.1	3.2
Servers total	2.1	2.3	2.4	2.5	2.6	2.7
Personal computers	2.1	2.2	2.3	2.1	2.0	1.9
Traditional workstations	1.3	0.7	1.1	1.1	1.1	1.1
Clients total	2.1	2.2	2.3	2.1	2.0	1.9
Systems total	2.1	2.2	2.3	2.2	2.2	2.1
Storage						
Disk systems	2.5	2.5	2.5	2.5	2.5	2.5
Tape automation	2.5	2.4	2.6	2.6	2.6	2.6
Storage total	2.5	2.5	2.5	2.5	2.5	2.5
Peripherals						
Printers and MFPs	2.5	2.5	2.6	2.6	2.6	2.7
Smart handheld devices	2.3	2.4	2.4	2.3	1.9	2.0
Other add-ons	2.1	2.3	2.2	2.1	2.0	1.8
Peripherals total	2.4	2.4	2.5	2.4	2.3	2.3
Networking equipment	3.5	3.3	3.3	3.2	3.0	3.0
Hardware total	2.4	2.4	2.5	2.4	2.3	2.3
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Services total	2.4	2.5	2.5	2.6	2.5	2.5
Total IT	2.4	2.4	2.5	2.4	2.4	2.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 147

DENMARK PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.6	0.6	0.6	0.6	0.6	0.6
Implementation	0.9	0.8	0.8	0.8	0.8	0.8
Maintenance and support	0.7	0.7	0.7	0.7	0.7	0.6
Operations	0.7	0.7	0.8	0.8	0.8	0.8
IT training and education	1.1	1.1	1.1	1.1	1.1	1.1
Services total	0.8	0.8	0.8	0.8	0.7	0.7
Packaged software						
System infrastructure software	0.7	0.7	0.7	0.7	0.7	0.6
Appl. development and deployment	0.8	0.8	0.8	0.8	0.8	0.7
Applications	0.7	0.7	0.7	0.7	0.7	0.7
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.4	0.4	0.5	0.5	0.4	0.4
Midrange enterprise servers	0.5	0.5	0.5	0.6	0.7	0.7
Volume servers	0.7	0.7	0.7	0.7	0.7	0.7
Servers total	0.6	0.6	0.6	0.6	0.6	0.6
Personal computers	0.6	0.6	0.6	0.5	0.5	0.5
Traditional workstations	0.4	0.2	0.4	0.4	0.4	0.4
Clients total	0.6	0.6	0.6	0.5	0.5	0.5
Systems total	0.6	0.6	0.6	0.6	0.5	0.5
Storage						
Disk systems	0.7	0.7	0.7	0.7	0.7	0.7
Tape automation	0.4	0.4	0.4	0.4	0.3	0.3
Storage total	0.7	0.7	0.7	0.7	0.7	0.6
Peripherals						
Printers and MFPs	0.7	0.7	0.8	0.8	0.9	0.9
Smart handheld devices	0.8	1.0	1.3	1.2	1.0	1.0
Other add-ons	0.5	0.6	0.5	0.5	0.4	0.4
Peripherals total	0.7	0.7	0.9	0.9	0.9	0.9
Networking equipment	0.9	0.9	0.8	0.8	0.8	0.8
Hardware total	0.6	0.7	0.7	0.7	0.7	0.7
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Services total	0.8	0.8	0.8	0.8	0.7	0.7
Total IT	0.7	0.7	0.7	0.7	0.7	0.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 148

IT SPENDING IN FINLAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	168.3	172.1	178.4	189.0	206.8	222.8
Implementation	668.3	680.7	699.2	738.6	806.6	875.9
Maintenance and support	410.9	425.0	435.3	450.3	477.8	515.7
Operations	287.5	312.9	334.3	355.4	374.5	406.4
IT training and education	149.1	152.5	154.8	161.2	173.3	177.8
Services total	1,684.1	1,743.2	1,802.0	1,894.6	2,039.1	2,198.6
Packaged software						
System infrastructure software	213.6	221.3	237.7	252.4	273.7	294.2
Appl. development and deployment	233.1	238.3	245.4	263.4	282.6	307.5
Applications	390.0	406.6	433.2	462.8	495.3	527.2
Packaged software total	836.7	866.2	916.4	978.5	1,051.6	1,128.9
Hardware						
Systems						
High-end enterprise servers	25.6	20.1	24.3	21.9	24.8	26.1
Midrange enterprise servers	118.8	83.8	81.4	85.4	84.0	86.5
Volume servers	104.1	87.9	83.3	87.8	98.8	101.5
Servers total	248.5	191.7	189.1	195.1	207.5	214.1
Personal computers	734.7	688.4	646.8	641.3	617.7	602.8
Traditional workstations	9.6	6.3	5.5	4.6	3.8	3.3
Clients total	744.3	694.7	652.3	645.9	621.5	606.1
Systems total	992.7	886.5	841.4	841.0	829.0	820.2
Storage						
Disk systems	80.4	77.4	76.4	78.7	81.0	83.1
Tape automation	10.8	11.6	11.1	10.9	10.6	10.8
Storage total	91.2	89.0	87.5	89.6	91.5	93.8
Peripherals						
Printers and MFPs	211.1	248.6	296.6	339.4	383.5	414.0
Smart handheld devices	53.6	85.0	180.7	262.2	323.9	369.1
Other add-ons	52.9	49.1	45.4	43.7	40.9	38.8
Peripherals total	317.6	382.7	522.6	645.3	748.3	821.9
Networking equipment	299.9	307.4	337.5	378.7	393.2	434.1
Hardware total	1,701.4	1,665.4	1,789.1	1,954.7	2,062.0	2,170.0
Packaged software total	836.7	866.2	916.4	978.5	1,051.6	1,128.9
Services total	1,684.1	1,743.2	1,802.0	1,894.6	2,039.1	2,198.6
Total IT	4,222.2	4,274.9	4,507.5	4,827.8	5,152.7	5,497.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 149

GROWTH IN IT SPENDING IN FINLAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	2.3	3.7	5.9	9.4	7.7	6.7
Implementation	1.9	2.7	5.6	9.2	8.6	6.5
Maintenance and support	3.4	2.4	3.5	6.1	7.9	5.0
Operations	8.8	6.8	6.3	5.4	8.5	6.8
IT training and education	2.3	1.5	4.1	7.5	2.6	3.9
Services total	3.5	3.4	5.1	7.6	7.8	6.0
Packaged software						
System infrastructure software	3.6	7.4	6.2	8.5	7.5	7.4
Appl. development and deployment	2.2	3.0	7.3	7.3	8.8	6.6
Applications	4.3	6.5	6.8	7.0	6.4	6.7
Packaged software total	3.5	5.8	6.8	7.5	7.3	6.8
Hardware						
Systems						
High-end enterprise servers	-21.5	21.3	-10.1	13.2	5.4	6.8
Midrange enterprise servers	-29.5	-2.8	4.9	-1.6	3.0	0.8
Volume servers	-15.5	-5.2	5.4	12.4	2.8	3.7
Servers total	-22.8	-1.4	3.2	6.4	3.2	2.8
Personal computers	-6.3	-6.0	-0.8	-3.7	-2.4	-3.3
Traditional workstations	-34.0	-12.4	-17.4	-16.7	-13.6	-15.1
Clients total	-6.3	-6.0	-0.8	-3.7	-2.4	-3.3
Systems total	-10.7	-5.1	0.0	-1.4	-1.1	-1.9
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	6.7	-4.1	-1.8	-2.6	1.5	-1.8
Storage total	-2.5	-1.6	2.4	2.2	2.5	1.3
Peripherals						
Printers and MFPs	17.8	19.3	14.4	13.0	7.9	13.6
Smart handheld devices	58.5	112.6	45.2	23.5	14.0	44.4
Other add-ons	-7.1	-7.6	-3.7	-6.5	-5.2	-5.7
Peripherals total	20.5	36.6	23.5	16.0	9.8	21.1
Networking equipment	2.5	9.8	12.2	3.8	10.4	9.0
Hardware total	-2.1	7.4	9.3	5.5	5.2	6.8
Packaged software total	3.5	5.8	6.8	7.5	7.3	6.8
Services total	3.5	3.4	5.1	7.6	7.8	6.0
Total IT	1.2	5.4	7.1	6.7	6.7	6.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 150

PROPORTIONS OF IT SPENDING CATEGORIES IN FINLAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.0	4.0	4.0	3.9	4.0	4.1
Implementation	15.8	15.9	15.5	15.3	15.7	15.9
Maintenance and support	9.7	9.9	9.7	9.3	9.3	9.4
Operations	6.8	7.3	7.4	7.4	7.3	7.4
IT training and education	3.5	3.6	3.4	3.3	3.4	3.2
Services total	39.9	40.8	40.0	39.2	39.6	40.0
Packaged software						
System infrastructure software	5.1	5.2	5.3	5.2	5.3	5.4
Appl. development and deployment	5.5	5.6	5.4	5.5	5.5	5.6
Applications	9.2	9.5	9.6	9.6	9.6	9.6
Packaged software total	19.8	20.3	20.3	20.3	20.4	20.5
Hardware						
Systems						
High-end enterprise servers	0.6	0.5	0.5	0.5	0.5	0.5
Midrange enterprise servers	2.8	2.0	1.8	1.8	1.6	1.6
Volume servers	2.5	2.1	1.8	1.8	1.9	1.8
Servers total	5.9	4.5	4.2	4.0	4.0	3.9
Personal computers	17.4	16.1	14.3	13.3	12.0	11.0
Traditional workstations	0.2	0.1	0.1	0.1	0.1	0.1
Clients total	17.4	16.1	14.3	13.3	12.0	11.0
Systems total	23.5	20.7	18.7	17.4	16.1	14.9
Storage						
Disk systems	1.9	1.8	1.7	1.6	1.6	1.5
Tape automation	0.3	0.3	0.2	0.2	0.2	0.2
Storage total	2.2	2.1	1.9	1.9	1.8	1.7
Peripherals						
Printers and MFPs	5.0	5.8	6.6	7.0	7.4	7.5
Smart handheld devices	1.3	2.0	4.0	5.4	6.3	6.7
Other add-ons	1.3	1.1	1.0	0.9	0.8	0.7
Peripherals total	7.5	9.0	11.6	13.4	14.5	15.0
Networking equipment	7.1	7.2	7.5	7.8	7.6	7.9
Hardware total	40.3	39.0	39.7	40.5	40.0	39.5
Packaged software total	19.8	20.3	20.3	20.3	20.4	20.5
Services total	39.9	40.8	40.0	39.2	39.6	40.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 151

FINLAND PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.6	1.6	1.7	1.7	1.7	1.8
Implementation	1.6	1.6	1.6	1.6	1.7	1.7
Maintenance and support	1.4	1.4	1.4	1.4	1.4	1.5
Operations	1.4	1.5	1.5	1.5	1.5	1.5
IT training and education	1.9	2.0	2.1	2.1	2.2	2.1
Services total	1.5	1.6	1.6	1.6	1.6	1.6
Packaged software						
System infrastructure software	1.5	1.4	1.4	1.4	1.4	1.4
Appl. development and deployment	2.0	1.9	1.9	1.9	1.9	1.9
Applications	1.5	1.5	1.5	1.5	1.5	1.5
Packaged software total	1.6	1.6	1.6	1.6	1.6	1.6
Hardware						
Systems						
High-end enterprise servers	0.6	0.6	0.7	0.7	0.8	0.9
Midrange enterprise servers	2.9	2.5	2.4	2.3	2.2	2.2
Volume servers	2.0	1.9	1.7	1.6	1.6	1.6
Servers total	1.9	1.7	1.6	1.6	1.6	1.6
Personal computers	1.7	1.7	1.6	1.6	1.5	1.4
Traditional workstations	1.5	1.1	1.2	1.2	1.2	1.2
Clients total	1.7	1.7	1.6	1.6	1.5	1.4
Systems total	1.8	1.7	1.6	1.6	1.5	1.5
Storage						
Disk systems	1.2	1.2	1.2	1.2	1.2	1.2
Tape automation	2.3	2.7	2.6	2.5	2.4	2.4
Storage total	1.3	1.3	1.3	1.3	1.3	1.3
Peripherals						
Printers and MFPs	1.8	2.0	2.1	2.3	2.4	2.5
Smart handheld devices	2.1	1.9	2.1	2.1	2.1	2.1
Other add-ons	1.7	1.7	1.7	1.6	1.6	1.5
Peripherals total	1.8	1.9	2.1	2.1	2.2	2.2
Networking equipment	2.4	2.4	2.5	2.6	2.4	2.5
Hardware total	1.8	1.8	1.8	1.9	1.9	1.9
Packaged software total	1.6	1.6	1.6	1.6	1.6	1.6
Services total	1.5	1.6	1.6	1.6	1.6	1.6
Total IT	1.6	1.7	1.7	1.7	1.7	1.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 152

FINLAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.5	0.5	0.5	0.5
Implementation	0.5	0.5	0.5	0.5	0.5	0.5
Maintenance and support	0.4	0.4	0.4	0.4	0.4	0.4
Operations	0.4	0.4	0.5	0.4	0.4	0.4
IT training and education	0.7	0.7	0.7	0.7	0.7	0.7
Services total	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software						
System infrastructure software	0.5	0.5	0.5	0.5	0.5	0.5
Appl. development and deployment	0.6	0.6	0.6	0.6	0.6	0.6
Applications	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.2	0.2	0.2	0.2	0.2	0.2
Midrange enterprise servers	0.8	0.6	0.6	0.6	0.6	0.6
Volume servers	0.5	0.4	0.3	0.3	0.4	0.3
Servers total	0.5	0.4	0.4	0.4	0.4	0.4
Personal computers	0.5	0.5	0.4	0.4	0.4	0.4
Traditional workstations	0.4	0.4	0.4	0.4	0.4	0.4
Clients total	0.5	0.5	0.4	0.4	0.4	0.4
Systems total	0.5	0.5	0.4	0.4	0.4	0.4
Storage						
Disk systems	0.4	0.4	0.4	0.4	0.4	0.3
Tape automation	0.4	0.4	0.4	0.3	0.3	0.3
Storage total	0.4	0.4	0.4	0.4	0.3	0.3
Peripherals						
Printers and MFPs	0.5	0.6	0.7	0.7	0.8	0.8
Smart handheld devices	0.7	0.8	1.1	1.1	1.1	1.0
Other add-ons	0.4	0.4	0.4	0.4	0.3	0.3
Peripherals total	0.5	0.6	0.7	0.8	0.8	0.8
Networking equipment	0.6	0.6	0.6	0.7	0.6	0.6
Hardware total	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Services total	0.5	0.5	0.5	0.5	0.5	0.5
Total IT	0.5	0.5	0.5	0.5	0.5	0.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 153

IT SPENDING IN FRANCE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2,133.1	2,109.6	2,124.6	2,193.6	2,330.9	2,478.0
Implementation	8,536.2	8,472.7	8,519.4	8,747.3	9,251.3	9,832.3
Maintenance and support	5,927.2	5,946.5	6,006.7	6,208.8	6,535.0	6,904.5
Operations	3,825.4	3,917.3	4,031.8	4,290.8	4,608.4	4,955.3
IT training and education	1,329.9	1,287.7	1,262.5	1,275.4	1,320.8	1,373.2
Services total	21,751.7	21,733.8	21,945.0	22,715.8	24,046.4	25,543.4
Packaged software						
System infrastructure software	2,713.4	2,779.9	2,906.1	3,104.2	3,321.5	3,554.6
Appl. development and deployment	1,886.1	1,939.5	2,048.8	2,204.4	2,369.3	2,567.9
Applications	4,296.3	4,415.2	4,630.0	4,944.3	5,304.0	5,665.2
Packaged software total	8,895.8	9,134.7	9,584.9	10,252.9	10,994.7	11,787.7
Hardware						
Systems						
High-end enterprise servers	698.3	543.8	537.6	502.3	481.1	469.5
Midrange enterprise servers	642.3	531.5	546.3	593.2	578.0	584.5
Volume servers	771.2	647.3	654.1	711.4	804.2	829.0
Servers total	2,111.8	1,722.6	1,738.0	1,806.9	1,863.3	1,882.9
Personal computers	6,355.2	6,017.8	5,834.6	5,935.3	5,851.6	6,018.2
Traditional workstations	96.0	99.0	61.3	51.0	43.1	37.5
Clients total	6,451.1	6,116.8	5,895.9	5,986.2	5,894.7	6,055.7
Systems total	8,562.9	7,839.5	7,633.8	7,793.1	7,758.0	7,938.6
Storage						
Disk systems	873.8	841.5	830.8	855.8	880.0	902.9
Tape automation	70.6	59.8	59.1	59.2	63.9	65.1
Storage total	944.4	901.3	889.9	915.0	943.9	968.0
Peripherals						
Printers and MFPs	2,038.8	2,229.3	2,481.8	2,700.8	2,917.3	3,061.7
Smart handheld devices	326.0	638.9	1,168.8	1,656.3	2,128.0	2,442.4
Other add-ons	501.4	473.2	456.8	451.5	432.7	432.6
Peripherals total	2,866.2	3,341.4	4,107.3	4,808.6	5,478.0	5,936.8
Networking equipment	1,512.5	1,470.1	1,532.0	1,750.8	2,004.1	2,161.8
Hardware total	13,886.1	13,552.3	14,163.0	15,267.6	16,184.0	17,005.2
Packaged software total	8,895.8	9,134.7	9,584.9	10,252.9	10,994.7	11,787.7
Services total	21,751.7	21,733.8	21,945.0	22,715.8	24,046.4	25,543.4
Total IT	44,533.7	44,420.7	45,693.0	48,236.3	51,225.2	54,336.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 154

GROWTH IN IT SPENDING IN FRANCE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.1	0.7	3.2	6.3	6.3	4.1
Implementation	-0.7	0.6	2.7	5.8	6.3	3.8
Maintenance and support	0.3	1.0	3.4	5.3	5.7	3.8
Operations	2.4	2.9	6.4	7.4	7.5	6.1
IT training and education	-3.2	-2.0	1.0	3.6	4.0	1.6
Services total	-0.1	1.0	3.5	5.9	6.2	4.1
Packaged software						
System infrastructure software	2.5	4.5	6.8	7.0	7.0	6.3
Appl. development and deployment	2.8	5.6	7.6	7.5	8.4	7.3
Applications	2.8	4.9	6.8	7.3	6.8	6.4
Packaged software total	2.7	4.9	7.0	7.2	7.2	6.6
Hardware						
Systems						
High-end enterprise servers	-22.1	-1.1	-6.6	-4.2	-2.4	-3.6
Midrange enterprise servers	-17.2	2.8	8.6	-2.6	1.1	2.4
Volume servers	-16.1	1.0	8.8	13.0	3.1	6.4
Servers total	-18.4	0.9	4.0	3.1	1.1	2.2
Personal computers	-5.3	-3.0	1.7	-1.4	2.8	0.0
Traditional workstations	3.2	-38.1	-16.8	-15.5	-13.0	-21.6
Clients total	-5.3	-3.0	1.7	-1.4	2.8	0.0
Systems total	-8.4	-2.6	2.1	-0.5	2.3	0.3
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-15.3	-1.2	0.1	7.9	1.9	2.1
Storage total	-4.6	-1.3	2.8	3.2	2.6	1.8
Peripherals						
Printers and MFPs	9.3	11.3	8.8	8.0	5.0	8.3
Smart handheld devices	96.0	82.9	41.7	28.5	14.8	39.8
Other add-ons	-5.6	-3.5	-1.1	-4.2	0.0	-2.2
Peripherals total	16.6	22.9	17.1	13.9	8.4	15.5
Networking equipment	-2.8	4.2	14.3	14.5	7.9	10.1
Hardware total	-2.4	4.5	7.8	6.0	5.1	5.8
Packaged software total	2.7	4.9	7.0	7.2	7.2	6.6
Services total	-0.1	1.0	3.5	5.9	6.2	4.1
Total IT	-0.3	2.9	5.6	6.2	6.1	5.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

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TABLE 155

PROPORTIONS OF IT SPENDING CATEGORIES IN FRANCE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.8	4.7	4.6	4.5	4.6	4.6
Implementation	19.2	19.1	18.6	18.1	18.1	18.1
Maintenance and support	13.3	13.4	13.1	12.9	12.8	12.7
Operations	8.6	8.8	8.8	8.9	9.0	9.1
IT training and education	3.0	2.9	2.8	2.6	2.6	2.5
Services total	48.8	48.9	48.0	47.1	46.9	47.0
Packaged software						
System infrastructure software	6.1	6.3	6.4	6.4	6.5	6.5
Appl. development and deployment	4.2	4.4	4.5	4.6	4.6	4.7
Applications	9.6	9.9	10.1	10.3	10.4	10.4
Packaged software total	20.0	20.6	21.0	21.3	21.5	21.7
Hardware						
Systems						
High-end enterprise servers	1.6	1.2	1.2	1.0	0.9	0.9
Midrange enterprise servers	1.4	1.2	1.2	1.2	1.1	1.1
Volume servers	1.7	1.5	1.4	1.5	1.6	1.5
Servers total	4.7	3.9	3.8	3.7	3.6	3.5
Personal computers	14.3	13.5	12.8	12.3	11.4	11.1
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	14.3	13.5	12.8	12.3	11.4	11.1
Systems total	19.2	17.6	16.7	16.2	15.1	14.6
Storage						
Disk systems	2.0	1.9	1.8	1.8	1.7	1.7
Tape automation	0.2	0.1	0.1	0.1	0.1	0.1
Storage total	2.1	2.0	1.9	1.9	1.8	1.8
Peripherals						
Printers and MFPs	4.6	5.0	5.4	5.6	5.7	5.6
Smart handheld devices	0.7	1.4	2.6	3.4	4.2	4.5
Other add-ons	1.1	1.1	1.0	0.9	0.8	0.8
Peripherals total	6.4	7.5	9.0	10.0	10.7	10.9
Networking equipment	3.4	3.3	3.4	3.6	3.9	4.0
Hardware total	31.2	30.5	31.0	31.7	31.6	31.3
Packaged software total	20.0	20.6	21.0	21.3	21.5	21.7
Services total	48.8	48.9	48.0	47.1	46.9	47.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 156

FRANCE PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	20.2	20.0	19.8	19.6	19.5	19.5
Implementation	20.0	19.9	19.7	19.5	19.4	19.4
Maintenance and support	20.0	19.8	19.7	19.7	19.6	19.6
Operations	19.2	18.8	18.5	18.5	18.4	18.5
IT training and education	17.4	17.0	16.7	16.6	16.5	16.6
Services total	19.7	19.5	19.3	19.2	19.1	19.1
Packaged software						
System infrastructure software	18.4	17.9	17.5	17.5	17.5	17.4
Appl. development and deployment	15.8	15.8	15.9	16.0	15.9	15.9
Applications	16.2	16.4	16.5	16.5	16.6	16.6
Packaged software total	16.7	16.7	16.7	16.7	16.7	16.7
Hardware						
Systems						
High-end enterprise servers	17.7	16.0	15.8	15.6	15.7	15.7
Midrange enterprise servers	15.7	15.6	15.8	15.6	15.2	14.7
Volume servers	14.5	13.6	13.0	12.9	13.1	13.2
Servers total	15.8	14.9	14.6	14.4	14.3	14.2
Personal computers	14.9	14.9	14.9	14.8	14.6	14.4
Traditional workstations	14.5	17.4	13.4	13.4	13.4	13.3
Clients total	14.9	15.0	14.8	14.8	14.5	14.4
Systems total	15.1	15.0	14.8	14.7	14.5	14.4
Storage						
Disk systems	13.5	13.5	13.5	13.5	13.5	13.5
Tape automation	14.8	14.0	13.9	13.8	14.7	14.7
Storage total	13.6	13.5	13.5	13.5	13.6	13.6
Peripherals						
Printers and MFPs	17.7	17.6	17.8	18.0	18.3	18.5
Smart handheld devices	12.8	13.9	13.7	13.4	13.7	13.8
Other add-ons	15.8	16.3	16.7	16.7	16.5	16.5
Peripherals total	16.6	16.6	16.3	16.0	16.1	16.1
Networking equipment	12.0	11.6	11.5	11.9	12.3	12.3
Hardware total	14.9	14.7	14.6	14.6	14.6	14.6
Packaged software total	16.7	16.7	16.7	16.7	16.7	16.7
Services total	19.7	19.5	19.3	19.2	19.1	19.1
Total IT	17.3	17.2	17.1	17.0	16.9	16.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 157

FRANCE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.8	5.7	5.6	5.4	5.4	5.4
Implementation	6.4	6.3	6.1	6.0	5.9	5.9
Maintenance and support	6.4	6.2	6.0	5.8	5.7	5.6
Operations	5.8	5.6	5.4	5.4	5.3	5.3
IT training and education	6.1	6.0	5.8	5.7	5.5	5.4
Services total	6.2	6.1	5.9	5.7	5.7	5.6
Packaged software						
System infrastructure software	5.9	5.8	5.7	5.7	5.6	5.6
Appl. development and deployment	4.8	4.8	4.8	4.8	4.8	4.8
Applications	5.0	5.0	5.0	5.0	5.0	5.0
Packaged software total	5.2	5.2	5.2	5.1	5.1	5.1
Hardware						
Systems						
High-end enterprise servers	5.2	4.6	4.7	4.5	4.3	4.3
Midrange enterprise servers	4.3	4.0	3.9	4.0	3.9	3.7
Volume servers	3.7	2.9	2.7	2.8	2.9	2.8
Servers total	4.3	3.6	3.5	3.5	3.5	3.4
Personal computers	4.1	4.1	3.9	3.8	3.7	3.7
Traditional workstations	4.1	5.9	4.8	4.9	4.9	4.8
Clients total	4.1	4.1	3.9	3.8	3.7	3.7
Systems total	4.2	4.0	3.8	3.7	3.6	3.6
Storage						
Disk systems	4.0	4.0	3.9	3.9	3.8	3.8
Tape automation	2.4	2.0	1.9	1.9	1.9	1.8
Storage total	3.9	3.8	3.6	3.6	3.6	3.5
Peripherals						
Printers and MFPs	5.0	5.2	5.5	5.8	6.0	6.2
Smart handheld devices	4.4	5.8	7.0	7.2	7.2	6.9
Other add-ons	3.9	4.1	3.9	3.7	3.4	3.3
Peripherals total	4.7	5.1	5.6	5.9	6.1	6.0
Networking equipment	3.0	3.0	2.9	3.1	3.2	3.2
Hardware total	4.1	4.0	4.0	4.1	4.1	4.1
Packaged software total	5.2	5.2	5.2	5.1	5.1	5.1
Services total	6.2	6.1	5.9	5.7	5.7	5.6
Total IT	5.2	5.1	5.0	5.0	5.0	4.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 158

IT SPENDING IN GERMANY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2,107.5	2,059.1	2,076.5	2,143.8	2,270.1	2,411.6
Implementation	8,220.5	8,051.0	8,057.3	8,238.1	8,662.8	9,169.7
Maintenance and support	6,035.7	6,025.5	5,975.9	6,044.9	6,305.0	6,606.4
Operations	4,129.2	4,270.2	4,431.4	4,690.8	5,068.5	5,389.8
IT training and education	1,715.7	1,666.3	1,615.0	1,588.6	1,615.8	1,650.0
Services total	22,208.5	22,072.1	22,156.1	22,706.1	23,922.3	25,227.5
Packaged software						
System infrastructure software	3,350.0	3,617.0	3,883.6	4,186.2	4,478.6	4,812.8
Appl. development and deployment	2,584.6	2,668.4	2,817.9	2,999.3	3,278.9	3,571.7
Applications	6,119.4	6,154.3	6,471.0	6,884.3	7,381.5	7,857.3
Packaged software total	12,054.0	12,439.7	13,172.4	14,069.9	15,139.0	16,241.9
Hardware						
Systems						
High-end enterprise servers	1,329.8	1,095.1	1,067.6	1,051.8	979.6	924.0
Midrange enterprise servers	904.6	770.9	788.6	870.7	811.0	812.0
Volume servers	1,112.7	937.9	974.2	1,091.2	1,176.8	1,183.5
Servers total	3,347.2	2,804.0	2,830.3	3,013.7	2,967.4	2,919.5
Personal computers	9,489.7	8,447.1	7,930.3	7,992.4	7,929.9	8,316.1
Traditional workstations	231.0	225.8	166.7	138.8	117.3	102.1
Clients total	9,720.7	8,673.0	8,097.0	8,131.1	8,047.2	8,418.3
Systems total	13,067.8	11,476.9	10,927.3	11,144.9	11,014.6	11,337.8
Storage						
Disk systems	1,618.3	1,558.4	1,538.6	1,584.9	1,629.8	1,672.2
Tape automation	117.2	114.2	108.4	104.0	95.8	98.0
Storage total	1,735.5	1,672.6	1,647.0	1,689.0	1,725.6	1,770.2
Peripherals						
Printers and MFPs	2,398.6	2,518.6	2,643.4	2,723.9	2,790.0	2,826.4
Smart handheld devices	547.1	899.5	1,664.3	2,414.3	3,048.0	3,491.3
Other add-ons	692.9	616.8	562.0	545.4	517.0	518.1
Peripherals total	3,638.6	4,034.9	4,869.7	5,683.7	6,355.0	6,835.7
Networking equipment	2,802.8	2,772.6	2,945.7	3,229.4	3,533.5	3,796.2
Hardware total	21,244.7	19,957.1	20,389.7	21,746.9	22,628.7	23,739.9
Packaged software total	12,054.0	12,439.7	13,172.4	14,069.9	15,139.0	16,241.9
Services total	22,208.5	22,072.1	22,156.1	22,706.1	23,922.3	25,227.5
Total IT	55,507.2	54,468.9	55,718.3	58,522.9	61,690.0	65,209.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 159

GROWTH IN IT SPENDING IN GERMANY, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-2.3	0.8	3.2	5.9	6.2	4.0
Implementation	-2.1	0.1	2.2	5.2	5.9	3.3
Maintenance and support	-0.2	-0.8	1.2	4.3	4.8	2.3
Operations	3.4	3.8	5.9	8.1	6.3	6.0
IT training and education	-2.9	-3.1	-1.6	1.7	2.1	-0.2
Services total	-0.6	0.4	2.5	5.4	5.5	3.4
Packaged software						
System infrastructure software	8.0	7.4	7.8	7.0	7.5	7.4
Appl. development and deployment	3.2	5.6	6.4	9.3	8.9	7.6
Applications	0.6	5.1	6.4	7.2	6.4	6.3
Packaged software total	3.2	5.9	6.8	7.6	7.3	6.9
Hardware						
Systems						
High-end enterprise servers	-17.6	-2.5	-1.5	-6.9	-5.7	-4.2
Midrange enterprise servers	-14.8	2.3	10.4	-6.9	0.1	1.3
Volume servers	-15.7	3.9	12.0	7.8	0.6	6.0
Servers total	-16.2	0.9	6.5	-1.5	-1.6	1.0
Personal computers	-11.0	-6.1	0.8	-0.8	4.9	-0.4
Traditional workstations	-2.2	-26.2	-16.8	-15.4	-12.9	-18.0
Clients total	-11.0	-6.1	0.8	-0.8	4.9	-0.4
Systems total	-12.2	-4.8	2.0	-1.2	2.9	-0.3
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-2.6	-5.1	-4.0	-7.9	2.3	-3.8
Storage total	-3.6	-1.5	2.5	2.2	2.6	1.4
Peripherals						
Printers and MFPs	5.0	5.0	3.0	2.4	1.3	2.9
Smart handheld devices	64.4	85.0	45.1	26.2	14.5	40.4
Other add-ons	-11.0	-8.9	-3.0	-5.2	0.2	-4.3
Peripherals total	10.9	20.7	16.7	11.8	7.6	14.1
Networking equipment	-1.1	6.2	9.6	9.4	7.4	8.2
Hardware total	-6.1	2.2	6.7	4.1	4.9	4.4
Packaged software total	3.2	5.9	6.8	7.6	7.3	6.9
Services total	-0.6	0.4	2.5	5.4	5.5	3.4
Total IT	-1.9	2.3	5.0	5.4	5.7	4.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 160

PROPORTIONS OF IT SPENDING CATEGORIES IN GERMANY, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.8	3.8	3.7	3.7	3.7	3.7
Implementation	14.8	14.8	14.5	14.1	14.0	14.1
Maintenance and support	10.9	11.1	10.7	10.3	10.2	10.1
Operations	7.4	7.8	8.0	8.0	8.2	8.3
IT training and education	3.1	3.1	2.9	2.7	2.6	2.5
Services total	40.0	40.5	39.8	38.8	38.8	38.7
Packaged software						
System infrastructure software	6.0	6.6	7.0	7.2	7.3	7.4
Appl. development and deployment	4.7	4.9	5.1	5.1	5.3	5.5
Applications	11.0	11.3	11.6	11.8	12.0	12.0
Packaged software total	21.7	22.8	23.6	24.0	24.5	24.9
Hardware						
Systems						
High-end enterprise servers	2.4	2.0	1.9	1.8	1.6	1.4
Midrange enterprise servers	1.6	1.4	1.4	1.5	1.3	1.2
Volume servers	2.0	1.7	1.7	1.9	1.9	1.8
Servers total	6.0	5.1	5.1	5.1	4.8	4.5
Personal computers	17.1	15.5	14.2	13.7	12.9	12.8
Traditional workstations	0.4	0.4	0.3	0.2	0.2	0.2
Clients total	17.1	15.5	14.2	13.7	12.9	12.8
Systems total	23.5	21.1	19.6	19.0	17.9	17.4
Storage						
Disk systems	2.9	2.9	2.8	2.7	2.6	2.6
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	3.1	3.1	3.0	2.9	2.8	2.7
Peripherals						
Printers and MFPs	4.3	4.6	4.7	4.7	4.5	4.3
Smart handheld devices	1.0	1.7	3.0	4.1	4.9	5.4
Other add-ons	1.2	1.1	1.0	0.9	0.8	0.8
Peripherals total	6.6	7.4	8.7	9.7	10.3	10.5
Networking equipment	5.0	5.1	5.3	5.5	5.7	5.8
Hardware total	38.3	36.6	36.6	37.2	36.7	36.4
Packaged software total	21.7	22.8	23.6	24.0	24.5	24.9
Services total	40.0	40.5	39.8	38.8	38.8	38.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 161

GERMANY PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	20.0	19.5	19.4	19.2	19.0	19.0
Implementation	19.3	18.9	18.6	18.3	18.2	18.1
Maintenance and support	20.3	20.1	19.6	19.2	18.9	18.7
Operations	20.7	20.5	20.4	20.2	20.3	20.1
IT training and education	22.4	22.0	21.4	20.7	20.1	19.9
Services total	20.1	19.8	19.5	19.2	19.0	18.9
Packaged software						
System infrastructure software	22.7	23.3	23.4	23.6	23.5	23.5
Appl. development and deployment	21.7	21.8	21.9	21.8	22.0	22.1
Applications	23.1	22.9	23.1	23.0	23.0	23.0
Packaged software total	22.7	22.7	22.9	22.9	23.0	23.0
Hardware						
Systems						
High-end enterprise servers	33.7	32.1	31.4	32.6	32.0	30.9
Midrange enterprise servers	22.1	22.6	22.8	23.0	21.3	20.4
Volume servers	20.9	19.8	19.4	19.8	19.2	18.9
Servers total	25.1	24.3	23.8	24.0	22.8	22.0
Personal computers	22.3	21.0	20.2	20.0	19.7	19.9
Traditional workstations	34.9	39.6	36.5	36.4	36.4	36.4
Clients total	22.5	21.2	20.4	20.1	19.9	20.1
Systems total	23.1	21.9	21.2	21.0	20.6	20.5
Storage						
Disk systems	25.0	25.0	25.0	25.0	25.0	25.0
Tape automation	24.5	26.7	25.5	24.2	22.1	22.1
Storage total	25.0	25.1	25.1	25.0	24.8	24.8
Peripherals						
Printers and MFPs	20.9	19.8	18.9	18.2	17.5	17.1
Smart handheld devices	21.4	19.6	19.4	19.5	19.7	19.7
Other add-ons	21.9	21.3	20.5	20.2	19.7	19.7
Peripherals total	21.1	20.0	19.3	18.9	18.7	18.5
Networking equipment	22.2	21.9	22.1	22.0	21.8	21.6
Hardware total	22.8	21.7	21.1	20.8	20.4	20.3
Packaged software total	22.7	22.7	22.9	22.9	23.0	23.0
Services total	20.1	19.8	19.5	19.2	19.0	18.9
Total IT	21.6	21.1	20.8	20.6	20.4	20.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 162

GERMANY PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.7	5.6	5.4	5.3	5.3	5.3
Implementation	6.2	6.0	5.8	5.6	5.5	5.5
Maintenance and support	6.5	6.3	6.0	5.7	5.5	5.4
Operations	6.3	6.1	6.0	5.9	5.9	5.8
IT training and education	7.9	7.8	7.4	7.1	6.8	6.5
Services total	6.3	6.2	5.9	5.7	5.6	5.5
Packaged software						
System infrastructure software	7.3	7.6	7.7	7.7	7.6	7.5
Appl. development and deployment	6.6	6.6	6.7	6.6	6.6	6.7
Applications	7.1	7.0	7.0	6.9	6.9	6.9
Packaged software total	7.1	7.1	7.1	7.1	7.0	7.0
Hardware						
Systems						
High-end enterprise servers	10.0	9.3	9.3	9.4	8.7	8.4
Midrange enterprise servers	6.1	5.7	5.6	5.9	5.5	5.2
Volume servers	5.3	4.3	4.1	4.2	4.2	4.0
Servers total	6.8	5.9	5.7	5.8	5.5	5.2
Personal computers	6.1	5.7	5.3	5.1	4.9	5.1
Traditional workstations	9.8	13.5	12.9	13.2	13.4	13.1
Clients total	6.2	5.8	5.3	5.2	5.0	5.1
Systems total	6.3	5.9	5.4	5.3	5.1	5.1
Storage						
Disk systems	7.5	7.4	7.2	7.1	7.1	7.0
Tape automation	4.0	3.9	3.6	3.3	2.9	2.8
Storage total	7.1	7.0	6.7	6.7	6.5	6.5
Peripherals						
Printers and MFPs	5.8	5.8	5.9	5.8	5.8	5.7
Smart handheld devices	7.3	8.2	10.0	10.5	10.4	9.8
Other add-ons	5.5	5.3	4.8	4.5	4.1	4.0
Peripherals total	5.9	6.1	6.6	6.9	7.0	7.0
Networking equipment	5.6	5.6	5.7	5.7	5.7	5.6
Hardware total	6.2	6.0	5.8	5.8	5.7	5.7
Packaged software total	7.1	7.1	7.1	7.1	7.0	7.0
Services total	6.3	6.2	5.9	5.7	5.6	5.5
Total IT	6.4	6.3	6.1	6.0	6.0	5.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 163

IT SPENDING IN GREECE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	49.0	53.6	59.4	65.1	69.9	74.2
Implementation	238.8	263.2	291.5	318.1	341.2	360.7
Maintenance and support	154.1	168.4	184.9	202.1	219.2	236.3
Operations	30.6	33.7	37.7	41.7	46.0	50.8
IT training and education	22.6	24.9	27.7	30.6	33.5	36.4
Services total	495.1	543.8	601.2	657.5	709.9	758.5
Packaged software						
System infrastructure software	73.7	77.9	82.6	90.0	96.7	104.3
Appl. development and deployment	69.1	70.6	73.7	79.5	85.6	94.2
Applications	126.1	129.2	136.3	148.3	160.3	171.3
Packaged software total	269.0	277.6	292.6	317.8	342.6	369.9
Hardware						
Systems						
High-end enterprise servers	6.7	9.7	9.4	9.0	9.0	9.8
Midrange enterprise servers	24.6	18.5	20.8	23.1	23.1	24.6
Volume servers	45.8	40.3	41.8	45.0	49.6	50.6
Servers total	77.1	68.5	72.0	77.1	81.8	85.0
Personal computers	462.5	455.4	453.8	464.4	499.3	526.4
Traditional workstations	3.0	2.2	1.4	1.2	1.0	0.8
Clients total	465.5	457.6	455.3	465.6	500.3	527.2
Systems total	542.6	526.1	527.3	542.7	582.0	612.3
Storage						
Disk systems	14.9	14.3	14.1	14.6	15.0	15.4
Tape automation	2.6	1.5	1.6	1.7	2.3	2.3
Storage total	17.5	15.8	15.7	16.3	17.3	17.7
Peripherals						
Printers and MFPs	114.6	146.1	152.7	157.8	163.0	164.4
Smart handheld devices	13.9	21.7	51.0	95.3	142.3	180.0
Other add-ons	29.1	27.4	26.6	26.5	27.7	28.5
Peripherals total	157.5	195.2	230.3	279.6	332.9	372.8
Networking equipment	99.0	112.8	134.0	167.9	218.4	262.3
Hardware total	816.7	849.8	907.3	1,006.4	1,150.7	1,265.0
Packaged software total	269.0	277.6	292.6	317.8	342.6	369.9
Services total	495.1	543.8	601.2	657.5	709.9	758.5
Total IT	1,580.8	1,671.3	1,801.2	1,981.7	2,203.1	2,393.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 164

GROWTH IN IT SPENDING IN GREECE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	9.6	10.8	9.5	7.5	6.1	8.4
Implementation	10.2	10.8	9.1	7.3	5.7	8.2
Maintenance and support	9.2	9.8	9.3	8.5	7.8	8.8
Operations	10.2	11.9	10.6	10.5	10.3	10.8
IT training and education	10.2	10.9	10.6	9.3	8.9	9.9
Services total	9.8	10.6	9.4	8.0	6.8	8.7
Packaged software						
System infrastructure software	5.7	6.1	8.8	7.5	7.9	7.6
Appl. development and deployment	2.1	4.4	7.9	7.6	10.1	7.5
Applications	2.4	5.5	8.8	8.1	6.9	7.3
Packaged software total	3.2	5.4	8.6	7.8	8.0	7.4
Hardware						
Systems						
High-end enterprise servers	44.1	-2.7	-4.2	0.0	8.0	0.2
Midrange enterprise servers	-25.1	12.5	11.4	-0.1	6.8	7.5
Volume servers	-11.9	3.7	7.5	10.3	2.0	5.8
Servers total	-11.2	5.1	7.1	6.0	4.0	5.6
Personal computers	-1.5	-0.3	2.3	7.5	5.4	3.7
Traditional workstations	-27.2	-33.8	-19.3	-18.1	-15.8	-22.1
Clients total	-1.5	-0.3	2.3	7.5	5.4	3.7
Systems total	-3.1	0.2	2.9	7.2	5.2	3.9
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-43.9	8.3	6.6	36.9	-0.5	12.0
Storage total	-9.7	-0.4	3.4	6.4	2.2	2.9
Peripherals						
Printers and MFPs	27.5	4.6	3.3	3.3	0.8	3.0
Smart handheld devices	56.6	134.6	86.8	49.4	26.5	69.6
Other add-ons	-5.8	-3.0	-0.3	4.5	3.1	1.0
Peripherals total	23.9	18.0	21.4	19.1	12.0	17.6
Networking equipment	13.9	18.8	25.3	30.1	20.1	23.5
Hardware total	4.1	6.8	10.9	14.3	9.9	10.5
Packaged software total	3.2	5.4	8.6	7.8	8.0	7.4
Services total	9.8	10.6	9.4	8.0	6.8	8.7
Total IT	5.7	7.8	10.0	11.2	8.6	9.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 165

PROPORTIONS OF IT SPENDING CATEGORIES IN GREECE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.1	3.2	3.3	3.3	3.2	3.1
Implementation	15.1	15.7	16.2	16.1	15.5	15.1
Maintenance and support	9.8	10.1	10.3	10.2	10.0	9.9
Operations	1.9	2.0	2.1	2.1	2.1	2.1
IT training and education	1.4	1.5	1.5	1.5	1.5	1.5
Services total	31.3	32.5	33.4	33.2	32.2	31.7
Packaged software						
System infrastructure software	4.7	4.7	4.6	4.5	4.4	4.4
Appl. development and deployment	4.4	4.2	4.1	4.0	3.9	3.9
Applications	8.0	7.7	7.6	7.5	7.3	7.2
Packaged software total	17.0	16.6	16.2	16.0	15.5	15.5
Hardware						
Systems						
High-end enterprise servers	0.4	0.6	0.5	0.5	0.4	0.4
Midrange enterprise servers	1.6	1.1	1.2	1.2	1.0	1.0
Volume servers	2.9	2.4	2.3	2.3	2.3	2.1
Servers total	4.9	4.1	4.0	3.9	3.7	3.6
Personal computers	29.3	27.2	25.2	23.4	22.7	22.0
Traditional workstations	0.2	0.1	0.1	0.1	0.0	0.0
Clients total	29.3	27.2	25.2	23.4	22.7	22.0
Systems total	34.3	31.5	29.3	27.4	26.4	25.6
Storage						
Disk systems	0.9	0.9	0.8	0.7	0.7	0.6
Tape automation	0.2	0.1	0.1	0.1	0.1	0.1
Storage total	1.1	0.9	0.9	0.8	0.8	0.7
Peripherals						
Printers and MFPs	7.2	8.7	8.5	8.0	7.4	6.9
Smart handheld devices	0.9	1.3	2.8	4.8	6.5	7.5
Other add-ons	1.8	1.6	1.5	1.3	1.3	1.2
Peripherals total	10.0	11.7	12.8	14.1	15.1	15.6
Networking equipment	6.3	6.7	7.4	8.5	9.9	11.0
Hardware total	51.7	50.8	50.4	50.8	52.2	52.9
Packaged software total	17.0	16.6	16.2	16.0	15.5	15.5
Services total	31.3	32.5	33.4	33.2	32.2	31.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 166

GREECE PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.6	0.6	0.6	0.6
Implementation	0.6	0.6	0.7	0.7	0.7	0.7
Maintenance and support	0.5	0.6	0.6	0.6	0.7	0.7
Operations	0.2	0.2	0.2	0.2	0.2	0.2
IT training and education	0.3	0.3	0.4	0.4	0.4	0.4
Services total	0.4	0.5	0.5	0.6	0.6	0.6
Packaged software						
System infrastructure software	0.5	0.5	0.5	0.5	0.5	0.5
Appl. development and deployment	0.6	0.6	0.6	0.6	0.6	0.6
Applications	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.2	0.3	0.3	0.3	0.3	0.3
Midrange enterprise servers	0.6	0.5	0.6	0.6	0.6	0.6
Volume servers	0.9	0.9	0.8	0.8	0.8	0.8
Servers total	0.6	0.6	0.6	0.6	0.6	0.6
Personal computers	1.1	1.1	1.2	1.2	1.2	1.3
Traditional workstations	0.5	0.4	0.3	0.3	0.3	0.3
Clients total	1.1	1.1	1.1	1.2	1.2	1.3
Systems total	1.0	1.0	1.0	1.0	1.1	1.1
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.6	0.3	0.4	0.4	0.5	0.5
Storage total	0.3	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	1.0	1.2	1.1	1.1	1.0	1.0
Smart handheld devices	0.5	0.5	0.6	0.8	0.9	1.0
Other add-ons	0.9	0.9	1.0	1.0	1.1	1.1
Peripherals total	0.9	1.0	0.9	0.9	1.0	1.0
Networking equipment	0.8	0.9	1.0	1.1	1.3	1.5
Hardware total	0.9	0.9	0.9	1.0	1.0	1.1
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Services total	0.4	0.5	0.5	0.6	0.6	0.6
Total IT	0.6	0.6	0.7	0.7	0.7	0.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 167

GREECE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.2	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.0	0.0	0.1	0.1	0.1	0.1
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.1	0.1	0.1	0.1	0.2	0.2
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.2	0.1	0.1	0.2	0.2	0.2
Volume servers	0.2	0.2	0.2	0.2	0.2	0.2
Servers total	0.2	0.1	0.1	0.1	0.2	0.2
Personal computers	0.3	0.3	0.3	0.3	0.3	0.3
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	0.3	0.3	0.3	0.3	0.3	0.3
Systems total	0.3	0.3	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.1	0.1	0.1	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.2	0.2	0.3	0.4	0.5	0.5
Other add-ons	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals total	0.3	0.3	0.3	0.3	0.4	0.4
Networking equipment	0.2	0.2	0.3	0.3	0.4	0.4
Hardware total	0.2	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.1	0.2	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 168

IT SPENDING IN IRELAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	61.4	63.7	67.3	72.7	79.1	83.9
Implementation	232.8	241.8	254.7	273.9	296.4	315.4
Maintenance and support	150.0	154.6	159.5	169.1	182.2	195.4
Operations	119.9	128.5	136.9	150.3	165.1	180.6
IT training and education	51.9	54.4	56.3	60.9	65.1	68.4
Services total	616.0	643.0	674.7	726.9	788.0	843.7
Packaged software						
System infrastructure software	104.3	107.6	115.1	120.1	130.2	140.5
Appl. development and deployment	91.6	92.3	95.2	99.9	107.2	115.7
Applications	186.4	188.1	197.4	209.2	223.9	238.8
Packaged software total	382.2	387.9	407.8	429.2	461.3	495.0
Hardware						
Systems						
High-end enterprise servers	12.4	10.1	11.9	10.8	11.1	11.1
Midrange enterprise servers	50.3	32.3	30.4	30.7	27.6	27.0
Volume servers	75.4	55.6	50.5	51.3	53.6	51.6
Servers total	138.1	98.1	92.9	92.9	92.3	89.7
Personal computers	471.0	451.0	456.8	477.5	487.5	505.9
Traditional workstations	8.0	5.8	4.0	3.3	2.8	2.4
Clients total	479.0	456.8	460.8	480.8	490.2	508.2
Systems total	617.2	554.9	553.6	573.7	582.5	597.9
Storage						
Disk systems	89.1	85.8	84.7	87.3	89.8	92.1
Tape automation	11.0	12.0	13.0	14.0	15.0	16.0
Storage total	100.1	97.8	97.7	101.3	104.8	108.1
Peripherals						
Printers and MFPs	104.2	116.6	132.6	147.4	162.6	171.6
Smart handheld devices	18.2	28.7	59.6	101.0	136.5	157.9
Other add-ons	33.0	27.6	25.2	25.6	25.3	25.6
Peripherals total	155.3	172.9	217.5	274.0	324.4	355.0
Networking equipment	144.5	151.9	163.6	182.0	198.5	225.9
Hardware total	1,017.1	977.5	1,032.4	1,131.0	1,210.3	1,287.0
Packaged software total	382.2	387.9	407.8	429.2	461.3	495.0
Services total	616.0	643.0	674.7	726.9	788.0	843.7
Total IT	2,015.3	2,008.4	2,114.9	2,287.2	2,459.5	2,625.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 169

GROWTH IN IT SPENDING IN IRELAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	3.8	5.6	8.0	8.8	6.1	7.1
Implementation	3.8	5.4	7.5	8.2	6.4	6.9
Maintenance and support	3.1	3.2	6.0	7.8	7.2	6.0
Operations	7.2	6.5	9.8	9.9	9.4	8.9
IT training and education	4.9	3.4	8.2	7.0	5.0	5.9
Services total	4.4	4.9	7.7	8.4	7.1	7.0
Packaged software						
System infrastructure software	3.1	7.0	4.3	8.4	7.9	6.9
Appl. development and deployment	0.8	3.2	5.0	7.2	8.0	5.8
Applications	0.9	5.0	5.9	7.0	6.7	6.2
Packaged software total	1.5	5.1	5.3	7.5	7.3	6.3
Hardware						
Systems						
High-end enterprise servers	-18.8	18.4	-9.5	2.9	-0.3	2.4
Midrange enterprise servers	-35.7	-6.1	1.1	-10.3	-2.1	-4.4
Volume servers	-26.2	-9.2	1.6	4.4	-3.7	-1.9
Servers total	-29.0	-5.3	0.0	-0.6	-2.8	-2.2
Personal computers	-4.2	1.3	4.5	2.1	3.8	2.9
Traditional workstations	-27.8	-31.6	-16.7	-16.4	-13.9	-20.0
Clients total	-4.2	1.3	4.5	2.1	3.8	2.9
Systems total	-10.1	-0.2	3.6	1.5	2.6	1.9
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	9.1	8.3	7.7	7.1	6.7	7.5
Storage total	-2.3	-0.1	3.6	3.4	3.2	2.5
Peripherals						
Printers and MFPs	11.9	13.7	11.2	10.3	5.5	10.1
Smart handheld devices	58.0	107.6	69.3	35.1	15.7	53.1
Other add-ons	-16.5	-8.4	1.4	-1.0	0.9	-1.9
Peripherals total	11.3	25.8	26.0	18.4	9.4	19.7
Networking equipment	5.2	7.7	11.3	9.1	13.8	10.4
Hardware total	-3.9	5.6	9.5	7.0	6.3	7.1
Packaged software total	1.5	5.1	5.3	7.5	7.3	6.3
Services total	4.4	4.9	7.7	8.4	7.1	7.0
Total IT	-0.3	5.3	8.1	7.5	6.8	6.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 170

PROPORTIONS OF IT SPENDING CATEGORIES IN IRELAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.0	3.2	3.2	3.2	3.2	3.2
Implementation	11.6	12.0	12.0	12.0	12.1	12.0
Maintenance and support	7.4	7.7	7.5	7.4	7.4	7.4
Operations	5.9	6.4	6.5	6.6	6.7	6.9
IT training and education	2.6	2.7	2.7	2.7	2.6	2.6
Services total	30.6	32.0	31.9	31.8	32.0	32.1
Packaged software						
System infrastructure software	5.2	5.4	5.4	5.3	5.3	5.3
Appl. development and deployment	4.5	4.6	4.5	4.4	4.4	4.4
Applications	9.2	9.4	9.3	9.1	9.1	9.1
Packaged software total	19.0	19.3	19.3	18.8	18.8	18.9
Hardware						
Systems						
High-end enterprise servers	0.6	0.5	0.6	0.5	0.5	0.4
Midrange enterprise servers	2.5	1.6	1.4	1.3	1.1	1.0
Volume servers	3.7	2.8	2.4	2.2	2.2	2.0
Servers total	6.9	4.9	4.4	4.1	3.8	3.4
Personal computers	23.4	22.5	21.6	20.9	19.8	19.3
Traditional workstations	0.4	0.3	0.2	0.1	0.1	0.1
Clients total	23.4	22.5	21.6	20.9	19.8	19.3
Systems total	30.6	27.6	26.2	25.1	23.7	22.8
Storage						
Disk systems	4.4	4.3	4.0	3.8	3.6	3.5
Tape automation	0.5	0.6	0.6	0.6	0.6	0.6
Storage total	5.0	4.9	4.6	4.4	4.3	4.1
Peripherals						
Printers and MFPs	5.2	5.8	6.3	6.4	6.6	6.5
Smart handheld devices	0.9	1.4	2.8	4.4	5.5	6.0
Other add-ons	1.6	1.4	1.2	1.1	1.0	1.0
Peripherals total	7.7	8.6	10.3	12.0	13.2	13.5
Networking equipment	7.2	7.6	7.7	8.0	8.1	8.6
Hardware total	50.5	48.7	48.8	49.4	49.2	49.0
Packaged software total	19.0	19.3	19.3	18.8	18.8	18.9
Services total	30.6	32.0	31.9	31.8	32.0	32.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 171

IRELAND PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.6	0.6	0.6	0.7	0.7	0.7
Implementation	0.5	0.6	0.6	0.6	0.6	0.6
Maintenance and support	0.5	0.5	0.5	0.5	0.5	0.6
Operations	0.6	0.6	0.6	0.6	0.7	0.7
IT training and education	0.7	0.7	0.7	0.8	0.8	0.8
Services total	0.6	0.6	0.6	0.6	0.6	0.6
Packaged software						
System infrastructure software	0.7	0.7	0.7	0.7	0.7	0.7
Appl. development and deployment	0.8	0.8	0.7	0.7	0.7	0.7
Applications	0.7	0.7	0.7	0.7	0.7	0.7
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.4	0.3	0.4	0.4
Midrange enterprise servers	1.2	0.9	0.9	0.8	0.7	0.7
Volume servers	1.4	1.2	1.0	0.9	0.9	0.8
Servers total	1.0	0.8	0.8	0.7	0.7	0.7
Personal computers	1.1	1.1	1.2	1.2	1.2	1.2
Traditional workstations	1.2	1.0	0.9	0.9	0.9	0.8
Clients total	1.1	1.1	1.2	1.2	1.2	1.2
Systems total	1.1	1.1	1.1	1.1	1.1	1.1
Storage						
Disk systems	1.4	1.4	1.4	1.4	1.4	1.4
Tape automation	2.3	2.8	3.1	3.3	3.5	3.6
Storage total	1.4	1.5	1.5	1.5	1.5	1.5
Peripherals						
Printers and MFPs	0.9	0.9	1.0	1.0	1.0	1.0
Smart handheld devices	0.7	0.6	0.7	0.8	0.9	0.9
Other add-ons	1.0	1.0	0.9	0.9	1.0	1.0
Peripherals total	0.9	0.9	0.9	0.9	1.0	1.0
Networking equipment	1.1	1.2	1.2	1.2	1.2	1.3
Hardware total	1.1	1.1	1.1	1.1	1.1	1.1
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Services total	0.6	0.6	0.6	0.6	0.6	0.6
Total IT	0.8	0.8	0.8	0.8	0.8	0.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 172

IRELAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.2	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.2	0.2	0.2	0.2	0.2	0.2
IT training and education	0.2	0.3	0.3	0.3	0.3	0.3
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.3	0.2	0.2	0.2	0.2	0.2
Volume servers	0.4	0.3	0.2	0.2	0.2	0.2
Servers total	0.3	0.2	0.2	0.2	0.2	0.2
Personal computers	0.3	0.3	0.3	0.3	0.3	0.3
Traditional workstations	0.3	0.3	0.3	0.3	0.3	0.3
Clients total	0.3	0.3	0.3	0.3	0.3	0.3
Systems total	0.3	0.3	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.4	0.4	0.4	0.4	0.4	0.4
Tape automation	0.4	0.4	0.4	0.4	0.4	0.5
Storage total	0.4	0.4	0.4	0.4	0.4	0.4
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.2	0.3	0.4	0.4	0.5	0.4
Other add-ons	0.3	0.2	0.2	0.2	0.2	0.2
Peripherals total	0.3	0.3	0.3	0.3	0.4	0.4
Networking equipment	0.3	0.3	0.3	0.3	0.3	0.3
Hardware total	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 173

IT SPENDING IN ITALY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	859.2	863.4	873.6	904.3	957.7	1,014.3
Implementation	3,518.2	3,542.4	3,581.4	3,712.4	3,923.7	4,125.6
Maintenance and support	2,511.7	2,514.7	2,521.3	2,601.0	2,742.7	2,886.5
Operations	1,608.5	1,682.9	1,736.9	1,837.1	1,973.6	2,105.5
IT training and education	629.5	620.2	622.8	629.0	660.1	666.7
Services total	9,127.0	9,223.6	9,336.0	9,683.8	10,257.8	10,798.6
Packaged software						
System infrastructure software	1,022.6	1,070.2	1,143.5	1,224.2	1,332.9	1,449.5
Appl. development and deployment	988.2	1,010.2	1,044.2	1,107.6	1,187.9	1,278.0
Applications	1,964.8	2,010.6	2,084.3	2,230.7	2,402.1	2,556.9
Packaged software total	3,975.6	4,090.9	4,272.0	4,562.6	4,922.9	5,284.4
Hardware						
Systems						
High-end enterprise servers	425.0	515.0	499.8	459.5	418.6	412.0
Midrange enterprise servers	433.2	368.2	397.1	450.7	520.8	586.8
Volume servers	499.1	554.8	662.6	766.1	885.1	940.1
Servers total	1,357.2	1,438.1	1,559.5	1,676.3	1,824.5	1,938.9
Personal computers	3,877.9	3,850.9	3,869.3	4,205.9	4,314.8	4,538.8
Traditional workstations	44.7	34.9	39.7	33.0	27.8	24.2
Clients total	3,922.6	3,885.8	3,909.0	4,238.8	4,342.6	4,563.0
Systems total	5,279.8	5,323.9	5,468.5	5,915.2	6,167.1	6,501.9
Storage						
Disk systems	668.3	643.6	635.4	654.5	673.1	690.6
Tape automation	29.2	21.3	21.4	21.7	27.1	27.4
Storage total	697.5	664.9	656.8	676.2	700.1	717.9
Peripherals						
Printers and MFPs	1,255.4	1,376.8	1,472.7	1,562.9	1,637.0	1,701.3
Smart handheld devices	244.7	522.2	1,062.1	1,643.8	2,262.9	2,682.7
Other add-ons	297.6	288.3	290.1	305.1	302.7	307.8
Peripherals total	1,797.7	2,187.2	2,824.9	3,511.8	4,202.6	4,691.8
Networking equipment	1,062.9	1,105.2	1,188.2	1,319.6	1,509.3	1,631.7
Hardware total	8,837.8	9,281.2	10,138.3	11,422.7	12,579.1	13,543.3
Packaged software total	3,975.6	4,090.9	4,272.0	4,562.6	4,922.9	5,284.4
Services total	9,127.0	9,223.6	9,336.0	9,683.8	10,257.8	10,798.6
Total IT	21,940.4	22,595.8	23,746.3	25,669.1	27,759.7	29,626.3

0Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 174

GROWTH IN IT SPENDING IN ITALY, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	0.5	1.2	3.5	5.9	5.9	4.1
Implementation	0.7	1.1	3.7	5.7	5.1	3.9
Maintenance and support	0.1	0.3	3.2	5.4	5.2	3.5
Operations	4.6	3.2	5.8	7.4	6.7	5.8
IT training and education	-1.5	0.4	1.0	4.9	1.0	1.8
Services total	1.1	1.2	3.7	5.9	5.3	4.0
Packaged software						
System infrastructure software	4.7	6.9	7.1	8.9	8.7	7.9
Appl. development and deployment	2.2	3.4	6.1	7.3	7.6	6.1
Applications	2.3	3.7	7.0	7.7	6.4	6.2
Packaged software total	2.9	4.4	6.8	7.9	7.3	6.6
Hardware						
Systems						
High-end enterprise servers	21.2	-3.0	-8.1	-8.9	-1.6	-5.4
Midrange enterprise servers	-15.0	7.8	13.5	15.6	12.7	12.4
Volume servers	11.2	19.4	15.6	15.5	6.2	14.1
Servers total	6.0	8.4	7.5	8.8	6.3	7.8
Personal computers	-0.7	0.5	8.7	2.6	5.2	4.2
Traditional workstations	-21.9	13.9	-17.0	-15.6	-13.0	-8.7
Clients total	-0.7	0.5	8.7	2.6	5.2	4.2
Systems total	0.8	2.7	8.2	4.3	5.4	5.1
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-26.9	0.2	1.4	24.8	1.1	6.4
Storage total	-4.7	-1.2	3.0	3.5	2.5	1.9
Peripherals						
Printers and MFPs	9.7	7.0	6.1	4.7	3.9	5.4
Smart handheld devices	113.4	103.4	54.8	37.7	18.6	50.5
Other add-ons	-3.1	0.6	5.2	-0.8	1.7	1.7
Peripherals total	21.7	29.2	24.3	19.7	11.6	21.0
Networking equipment	4.0	7.5	11.1	14.4	8.1	10.2
Hardware total	5.0	9.2	12.7	10.1	7.7	9.9
Packaged software total	2.9	4.4	6.8	7.9	7.3	6.6
Services total	1.1	1.2	3.7	5.9	5.3	4.0
Total IT	3.0	5.1	8.1	8.1	6.7	7.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 175

PROPORTIONS OF IT SPENDING CATEGORIES IN ITALY, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.9	3.8	3.7	3.5	3.5	3.4
Implementation	16.0	15.7	15.1	14.5	14.1	13.9
Maintenance and support	11.4	11.1	10.6	10.1	9.9	9.7
Operations	7.3	7.4	7.3	7.2	7.1	7.1
IT training and education	2.9	2.7	2.6	2.5	2.4	2.3
Services total	41.6	40.8	39.3	37.7	37.0	36.4
Packaged software						
System infrastructure software	4.7	4.7	4.8	4.8	4.8	4.9
Appl. development and deployment	4.5	4.5	4.4	4.3	4.3	4.3
Applications	9.0	8.9	8.8	8.7	8.7	8.6
Packaged software total	18.1	18.1	18.0	17.8	17.7	17.8
Hardware						
Systems						
High-end enterprise servers	1.9	2.3	2.1	1.8	1.5	1.4
Midrange enterprise servers	2.0	1.6	1.7	1.8	1.9	2.0
Volume servers	2.3	2.5	2.8	3.0	3.2	3.2
Servers total	6.2	6.4	6.6	6.5	6.6	6.5
Personal computers	17.7	17.0	16.3	16.4	15.5	15.3
Traditional workstations	0.2	0.2	0.2	0.1	0.1	0.1
Clients total	17.7	17.0	16.3	16.4	15.5	15.3
Systems total	24.1	23.6	23.0	23.0	22.2	21.9
Storage						
Disk systems	3.0	2.8	2.7	2.5	2.4	2.3
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	3.2	2.9	2.8	2.6	2.5	2.4
Peripherals						
Printers and MFPs	5.7	6.1	6.2	6.1	5.9	5.7
Smart handheld devices	1.1	2.3	4.5	6.4	8.2	9.1
Other add-ons	1.4	1.3	1.2	1.2	1.1	1.0
Peripherals total	8.2	9.7	11.9	13.7	15.1	15.8
Networking equipment	4.8	4.9	5.0	5.1	5.4	5.5
Hardware total	40.3	41.1	42.7	44.5	45.3	45.7
Packaged software total	18.1	18.1	18.0	17.8	17.7	17.8
Services total	41.6	40.8	39.3	37.7	37.0	36.4
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 176

ITALY PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	8.1	8.2	8.1	8.1	8.0	8.0
Implementation	8.3	8.3	8.3	8.3	8.2	8.1
Maintenance and support	8.5	8.4	8.3	8.2	8.2	8.2
Operations	8.1	8.1	8.0	7.9	7.9	7.9
IT training and education	8.2	8.2	8.3	8.2	8.2	8.0
Services total	8.3	8.3	8.2	8.2	8.1	8.1
Packaged software						
System infrastructure software	6.9	6.9	6.9	6.9	7.0	7.1
Appl. development and deployment	8.3	8.3	8.1	8.1	8.0	7.9
Applications	7.4	7.5	7.4	7.5	7.5	7.5
Packaged software total	7.5	7.5	7.4	7.4	7.5	7.5
Hardware						
Systems						
High-end enterprise servers	10.8	15.1	14.7	14.2	13.7	13.8
Midrange enterprise servers	10.6	10.8	11.5	11.9	13.7	14.8
Volume servers	9.4	11.7	13.2	13.9	14.5	15.0
Servers total	10.2	12.4	13.1	13.4	14.0	14.6
Personal computers	9.1	9.6	9.9	10.5	10.7	10.9
Traditional workstations	6.8	6.1	8.7	8.7	8.6	8.6
Clients total	9.1	9.5	9.8	10.5	10.7	10.9
Systems total	9.3	10.2	10.6	11.2	11.5	11.8
Storage						
Disk systems	10.3	10.3	10.3	10.3	10.3	10.3
Tape automation	6.1	5.0	5.0	5.0	6.2	6.2
Storage total	10.0	10.0	10.0	10.0	10.1	10.1
Peripherals						
Printers and MFPs	10.9	10.8	10.6	10.4	10.3	10.3
Smart handheld devices	9.6	11.4	12.4	13.3	14.6	15.2
Other add-ons	9.4	10.0	10.6	11.3	11.5	11.7
Peripherals total	10.4	10.8	11.2	11.7	12.3	12.7
Networking equipment	8.4	8.7	8.9	9.0	9.3	9.3
Hardware total	9.5	10.1	10.5	10.9	11.4	11.6
Packaged software total	7.5	7.5	7.4	7.4	7.5	7.5
Services total	8.3	8.3	8.2	8.2	8.1	8.1
Total IT	8.5	8.8	8.9	9.0	9.2	9.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 177

ITALY PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.3	2.3	2.2	2.2	2.2
Implementation	2.6	2.6	2.6	2.5	2.5	2.5
Maintenance and support	2.7	2.6	2.5	2.4	2.4	2.3
Operations	2.5	2.4	2.3	2.3	2.3	2.3
IT training and education	2.9	2.9	2.9	2.8	2.8	2.6
Services total	2.6	2.6	2.5	2.4	2.4	2.4
Packaged software						
System infrastructure software	2.2	2.2	2.3	2.2	2.3	2.3
Appl. development and deployment	2.5	2.5	2.5	2.4	2.4	2.4
Applications	2.3	2.3	2.2	2.2	2.2	2.3
Packaged software total	2.3	2.3	2.3	2.3	2.3	2.3
Hardware						
Systems						
High-end enterprise servers	3.2	4.4	4.4	4.1	3.7	3.8
Midrange enterprise servers	2.9	2.7	2.8	3.1	3.5	3.8
Volume servers	2.4	2.5	2.8	3.0	3.2	3.2
Servers total	2.8	3.0	3.1	3.2	3.4	3.5
Personal computers	2.5	2.6	2.6	2.7	2.7	2.8
Traditional workstations	1.9	2.1	3.1	3.1	3.2	3.1
Clients total	2.5	2.6	2.6	2.7	2.7	2.8
Systems total	2.6	2.7	2.7	2.8	2.9	2.9
Storage						
Disk systems	3.1	3.1	3.0	2.9	2.9	2.9
Tape automation	1.0	0.7	0.7	0.7	0.8	0.8
Storage total	2.8	2.8	2.7	2.7	2.6	2.6
Peripherals						
Printers and MFPs	3.1	3.2	3.3	3.4	3.4	3.4
Smart handheld devices	3.3	4.8	6.4	7.1	7.7	7.5
Other add-ons	2.3	2.5	2.5	2.5	2.4	2.4
Peripherals total	2.9	3.3	3.9	4.3	4.6	4.8
Networking equipment	2.1	2.2	2.3	2.3	2.4	2.4
Hardware total	2.6	2.8	2.9	3.1	3.2	3.3
Packaged software total	2.3	2.3	2.3	2.3	2.3	2.3
Services total	2.6	2.6	2.5	2.4	2.4	2.4
Total IT	2.5	2.6	2.6	2.7	2.7	2.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 178

IT SPENDING IN THE NETHERLANDS, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	522.7	522.9	531.7	558.4	594.2	626.3
Implementation	1,846.5	1,852.0	1,896.8	2,002.7	2,127.0	2,237.1
Maintenance and support	1,384.9	1,416.8	1,453.7	1,519.2	1,598.5	1,679.3
Operations	1,244.4	1,308.7	1,356.8	1,445.8	1,536.3	1,636.6
IT training and education	499.7	495.8	497.9	507.8	532.2	560.7
Services total	5,498.4	5,596.2	5,736.8	6,033.9	6,388.1	6,740.1
Packaged software						
System infrastructure software	962.7	982.5	1,047.3	1,129.2	1,229.9	1,332.5
Appl. development and deployment	956.7	973.9	1,004.4	1,072.4	1,145.6	1,237.5
Applications	1,869.4	1,924.0	2,021.1	2,142.9	2,293.7	2,441.6
Packaged software total	3,788.7	3,880.4	4,072.8	4,344.5	4,669.2	5,011.7
Hardware						
Systems						
High-end enterprise servers	118.8	107.9	113.3	106.7	105.7	108.1
Midrange enterprise servers	192.0	165.9	168.0	182.3	178.6	185.3
Volume servers	303.4	259.1	273.8	301.6	336.9	346.8
Servers total	614.2	532.9	555.1	590.7	621.2	640.2
Personal computers	2,245.2	2,074.5	1,903.7	1,950.6	2,009.8	2,041.6
Traditional workstations	30.1	23.3	20.3	16.8	14.2	12.3
Clients total	2,275.3	2,097.8	1,924.0	1,967.4	2,024.0	2,053.9
Systems total	2,889.4	2,630.7	2,479.1	2,558.1	2,645.2	2,694.2
Storage						
Disk systems	282.7	272.2	268.8	276.9	284.7	292.1
Tape automation	19.1	18.2	19.2	20.5	24.4	25.1
Storage total	301.8	290.4	288.0	297.4	309.1	317.2
Peripherals						
Printers and MFPs	539.3	605.1	670.5	729.4	786.3	814.5
Smart handheld devices	124.6	196.0	343.8	500.1	623.0	708.9
Other add-ons	179.1	161.1	148.3	146.8	146.1	143.4
Peripherals total	843.1	962.2	1,162.6	1,376.3	1,555.3	1,666.8
Networking equipment	707.9	710.7	729.4	791.7	880.3	963.2
Hardware total	4,742.2	4,594.0	4,659.1	5,023.4	5,389.9	5,641.3
Packaged software total	3,788.7	3,880.4	4,072.8	4,344.5	4,669.2	5,011.7
Services total	5,498.4	5,596.2	5,736.8	6,033.9	6,388.1	6,740.1
Total IT	14,029.3	14,070.6	14,468.7	15,401.8	16,447.3	17,393.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 179

GROWTH IN IT SPENDING IN THE NETHERLANDS, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	0.0	1.7	5.0	6.4	5.4	4.6
Implementation	0.3	2.4	5.6	6.2	5.2	4.8
Maintenance and support	2.3	2.6	4.5	5.2	5.1	4.3
Operations	5.2	3.7	6.6	6.3	6.5	5.7
IT training and education	-0.8	0.4	2.0	4.8	5.4	3.1
Services total	1.8	2.5	5.2	5.9	5.5	4.8
Packaged software						
System infrastructure software	2.1	6.6	7.8	8.9	8.3	7.9
Appl. development and deployment	1.8	3.1	6.8	6.8	8.0	6.2
Applications	2.9	5.0	6.0	7.0	6.4	6.1
Packaged software total	2.4	5.0	6.7	7.5	7.3	6.6
Hardware						
Systems						
High-end enterprise servers	-9.1	5.0	-5.8	-1.0	2.3	0.0
Midrange enterprise servers	-13.6	1.3	8.5	-2.0	3.7	2.8
Volume servers	-14.6	5.7	10.2	11.7	3.0	7.6
Servers total	-13.2	4.2	6.4	5.2	3.1	4.7
Personal computers	-7.6	-8.2	2.5	3.0	1.6	-0.4
Traditional workstations	-22.6	-13.0	-17.1	-15.6	-13.1	-14.7
Clients total	-7.6	-8.2	2.5	3.0	1.6	-0.4
Systems total	-9.0	-5.8	3.2	3.4	1.9	0.6
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-4.6	5.5	6.7	19.2	2.7	8.3
Storage total	-3.8	-0.8	3.3	4.0	2.6	2.2
Peripherals						
Printers and MFPs	12.2	10.8	8.8	7.8	3.6	7.7
Smart handheld devices	57.3	75.4	45.5	24.6	13.8	37.9
Other add-ons	-10.1	-7.9	-1.0	-0.5	-1.9	-2.9
Peripherals total	14.1	20.8	18.4	13.0	7.2	14.7
Networking equipment	0.4	2.6	8.5	11.2	9.4	7.9
Hardware total	-3.1	1.4	7.8	7.3	4.7	5.3
Packaged software total	2.4	5.0	6.7	7.5	7.3	6.6
Services total	1.8	2.5	5.2	5.9	5.5	4.8
Total IT	0.3	2.8	6.4	6.8	5.7	5.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 180

PROPORTIONS OF IT SPENDING CATEGORIES IN THE NETHERLANDS, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.7	3.7	3.7	3.6	3.6	3.6
Implementation	13.2	13.2	13.1	13.0	12.9	12.9
Maintenance and support	9.9	10.1	10.0	9.9	9.7	9.7
Operations	8.9	9.3	9.4	9.4	9.3	9.4
IT training and education	3.6	3.5	3.4	3.3	3.2	3.2
Services total	39.2	39.8	39.6	39.2	38.8	38.8
Packaged software						
System infrastructure software	6.9	7.0	7.2	7.3	7.5	7.7
Appl. development and deployment	6.8	6.9	6.9	7.0	7.0	7.1
Applications	13.3	13.7	14.0	13.9	13.9	14.0
Packaged software total	27.0	27.6	28.1	28.2	28.4	28.8
Hardware						
Systems						
High-end enterprise servers	0.8	0.8	0.8	0.7	0.6	0.6
Midrange enterprise servers	1.4	1.2	1.2	1.2	1.1	1.1
Volume servers	2.2	1.8	1.9	2.0	2.0	2.0
Servers total	4.4	3.8	3.8	3.8	3.8	3.7
Personal computers	16.0	14.7	13.2	12.7	12.2	11.7
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	16.0	14.7	13.2	12.7	12.2	11.7
Systems total	20.6	18.7	17.1	16.6	16.1	15.5
Storage						
Disk systems	2.0	1.9	1.9	1.8	1.7	1.7
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	2.2	2.1	2.0	1.9	1.9	1.8
Peripherals						
Printers and MFPs	3.8	4.3	4.6	4.7	4.8	4.7
Smart handheld devices	0.9	1.4	2.4	3.2	3.8	4.1
Other add-ons	1.3	1.1	1.0	1.0	0.9	0.8
Peripherals total	6.0	6.8	8.0	8.9	9.5	9.6
Networking equipment	5.0	5.1	5.0	5.1	5.4	5.5
Hardware total	33.8	32.6	32.2	32.6	32.8	32.4
Packaged software total	27.0	27.6	28.1	28.2	28.4	28.8
Services total	39.2	39.8	39.6	39.2	38.8	38.8
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 181

NETHERLANDS PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.9	5.0	5.0	5.0	5.0	4.9
Implementation	4.3	4.3	4.4	4.5	4.5	4.4
Maintenance and support	4.7	4.7	4.8	4.8	4.8	4.8
Operations	6.2	6.3	6.2	6.2	6.1	6.1
IT training and education	6.5	6.6	6.6	6.6	6.6	6.8
Services total	5.0	5.0	5.0	5.1	5.1	5.0
Packaged software						
System infrastructure software	6.5	6.3	6.3	6.4	6.5	6.5
Appl. development and deployment	8.0	8.0	7.8	7.8	7.7	7.7
Applications	7.1	7.1	7.2	7.2	7.2	7.2
Packaged software total	7.1	7.1	7.1	7.1	7.1	7.1
Hardware						
Systems						
High-end enterprise servers	3.0	3.2	3.3	3.3	3.4	3.6
Midrange enterprise servers	4.7	4.9	4.9	4.8	4.7	4.7
Volume servers	5.7	5.5	5.5	5.5	5.5	5.5
Servers total	4.6	4.6	4.7	4.7	4.8	4.8
Personal computers	5.3	5.1	4.8	4.9	5.0	4.9
Traditional workstations	4.6	4.1	4.4	4.4	4.4	4.4
Clients total	5.3	5.1	4.8	4.9	5.0	4.9
Systems total	5.1	5.0	4.8	4.8	4.9	4.9
Storage						
Disk systems	4.4	4.4	4.4	4.4	4.4	4.4
Tape automation	4.0	4.3	4.5	4.8	5.6	5.7
Storage total	4.3	4.4	4.4	4.4	4.5	4.5
Peripherals						
Printers and MFPs	4.7	4.8	4.8	4.9	4.9	4.9
Smart handheld devices	4.9	4.3	4.0	4.0	4.0	4.0
Other add-ons	5.7	5.6	5.4	5.4	5.6	5.5
Peripherals total	4.9	4.8	4.6	4.6	4.6	4.5
Networking equipment	5.6	5.6	5.5	5.4	5.4	5.5
Hardware total	5.1	5.0	4.8	4.8	4.9	4.8
Packaged software total	7.1	7.1	7.1	7.1	7.1	7.1
Services total	5.0	5.0	5.0	5.1	5.1	5.0
Total IT	5.5	5.4	5.4	5.4	5.4	5.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 182

NETHERLANDS PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.4	1.4	1.4	1.4	1.4	1.4
Implementation	1.4	1.4	1.4	1.4	1.4	1.3
Maintenance and support	1.5	1.5	1.5	1.4	1.4	1.4
Operations	1.9	1.9	1.8	1.8	1.8	1.8
IT training and education	2.3	2.3	2.3	2.3	2.2	2.2
Services total	1.6	1.6	1.5	1.5	1.5	1.5
Packaged software						
System infrastructure software	2.1	2.1	2.1	2.1	2.1	2.1
Appl. development and deployment	2.4	2.4	2.4	2.4	2.3	2.3
Applications	2.2	2.2	2.2	2.2	2.1	2.1
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Hardware						
Systems						
High-end enterprise servers	0.9	0.9	1.0	1.0	0.9	1.0
Midrange enterprise servers	1.3	1.2	1.2	1.2	1.2	1.2
Volume servers	1.4	1.2	1.1	1.2	1.2	1.2
Servers total	1.2	1.1	1.1	1.1	1.2	1.1
Personal computers	1.5	1.4	1.3	1.2	1.3	1.2
Traditional workstations	1.3	1.4	1.6	1.6	1.6	1.6
Clients total	1.5	1.4	1.3	1.2	1.3	1.2
Systems total	1.4	1.3	1.2	1.2	1.2	1.2
Storage						
Disk systems	1.3	1.3	1.3	1.2	1.2	1.2
Tape automation	0.7	0.6	0.6	0.6	0.7	0.7
Storage total	1.2	1.2	1.2	1.2	1.2	1.2
Peripherals						
Printers and MFPs	1.3	1.4	1.5	1.6	1.6	1.6
Smart handheld devices	1.7	1.8	2.1	2.2	2.1	2.0
Other add-ons	1.4	1.4	1.3	1.2	1.1	1.1
Peripherals total	1.4	1.5	1.6	1.7	1.7	1.7
Networking equipment	1.4	1.4	1.4	1.4	1.4	1.4
Hardware total	1.4	1.4	1.3	1.3	1.4	1.4
Packaged software total	2.2	2.2	2.2	2.2	2.2	2.2
Services total	1.6	1.6	1.5	1.5	1.5	1.5
Total IT	1.6	1.6	1.6	1.6	1.6	1.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 183

IT SPENDING IN NORWAY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	160.9	162.4	167.1	172.6	183.6	200.9
Implementation	664.2	665.2	675.1	693.3	738.5	805.6
Maintenance and support	434.7	432.1	429.9	440.1	467.4	497.4
Operations	292.5	298.2	306.7	322.4	352.2	375.6
IT training and education	141.9	137.4	140.9	145.9	158.9	160.2
Services total	1,694.3	1,695.3	1,719.6	1,774.2	1,900.6	2,039.7
Packaged software						
System infrastructure software	214.9	222.1	237.6	257.6	278.9	299.7
Appl. development and deployment	216.1	221.0	237.1	257.7	280.2	305.0
Applications	390.7	402.2	430.5	463.7	499.4	531.6
Packaged software total	821.6	845.3	905.3	979.1	1,058.5	1,136.3
Hardware						
Systems						
High-end enterprise servers	24.7	19.4	23.9	22.7	22.2	23.0
Midrange enterprise servers	69.9	47.9	47.5	49.0	46.9	46.2
Volume servers	120.4	102.6	97.8	102.4	108.4	108.3
Servers total	215.0	170.0	169.2	174.1	177.5	177.6
Personal computers	797.1	828.4	801.7	813.4	830.6	864.2
Traditional workstations	9.5	4.1	5.6	4.7	4.0	3.6
Clients total	806.5	832.5	807.3	818.2	834.7	867.8
Systems total	1,021.5	1,002.4	976.5	992.2	1,012.2	1,045.4
Storage						
Disk systems	88.8	85.5	84.5	87.0	89.5	91.8
Tape automation	10.0	7.9	8.3	8.7	8.4	8.8
Storage total	98.8	93.5	92.8	95.7	97.9	100.5
Peripherals						
Printers and MFPs	239.5	320.7	362.6	384.8	392.2	385.4
Smart handheld devices	36.7	61.7	114.7	165.8	219.4	251.1
Other add-ons	61.4	63.1	59.3	58.2	57.3	57.5
Peripherals total	337.6	445.5	536.6	608.8	668.9	694.0
Networking equipment	326.7	329.4	357.3	395.5	414.7	463.7
Hardware total	1,784.7	1,870.8	1,963.1	2,092.3	2,193.7	2,303.6
Packaged software total	821.6	845.3	905.3	979.1	1,058.5	1,136.3
Services total	1,694.3	1,695.3	1,719.6	1,774.2	1,900.6	2,039.7
Total IT	4,300.6	4,411.4	4,588.0	4,845.6	5,152.8	5,479.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 184

GROWTH IN IT SPENDING IN NORWAY, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	0.9	2.9	3.2	6.4	9.4	5.5
Implementation	0.2	1.5	2.7	6.5	9.1	4.9
Maintenance and support	-0.6	-0.5	2.4	6.2	6.4	3.6
Operations	1.9	2.8	5.1	9.3	6.6	5.9
IT training and education	-3.2	2.5	3.5	9.0	0.8	3.9
Services total	0.1	1.4	3.2	7.1	7.3	4.7
Packaged software						
System infrastructure software	3.4	7.0	8.4	8.2	7.5	7.8
Appl. development and deployment	2.3	7.3	8.7	8.7	8.8	8.4
Applications	3.0	7.0	7.7	7.7	6.4	7.2
Packaged software total	2.9	7.1	8.2	8.1	7.3	7.7
Hardware						
Systems						
High-end enterprise servers	-21.4	23.1	-5.2	-2.1	3.8	4.4
Midrange enterprise servers	-31.4	-1.0	3.4	-4.4	-1.5	-0.9
Volume servers	-14.8	-4.6	4.6	5.9	0.0	1.4
Servers total	-21.0	-0.4	2.9	2.0	0.1	1.1
Personal computers	3.9	-3.2	1.5	2.1	4.0	1.1
Traditional workstations	-56.5	35.1	-14.7	-14.7	-12.2	-3.6
Clients total	3.9	-3.2	1.5	2.1	4.0	1.1
Systems total	-1.9	-2.6	1.6	2.0	3.3	1.1
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-20.5	4.9	4.9	-3.6	4.0	2.5
Storage total	-5.4	-0.7	3.2	2.2	2.7	1.8
Peripherals						
Printers and MFPs	33.9	13.0	6.1	1.9	-1.7	4.7
Smart handheld devices	68.0	86.0	44.6	32.3	14.4	42.0
Other add-ons	2.8	-6.0	-2.0	-1.4	0.4	-2.3
Peripherals total	32.0	20.4	13.5	9.9	3.7	11.7
Networking equipment	0.8	8.5	10.7	4.9	11.8	8.9
Hardware total	4.8	4.9	6.6	4.8	5.0	5.3
Packaged software total	2.9	7.1	8.2	8.1	7.3	7.7
Services total	0.1	1.4	3.2	7.1	7.3	4.7
Total IT	2.6	4.0	5.6	6.3	6.3	5.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 185

PROPORTIONS OF IT SPENDING CATEGORIES IN NORWAY, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.7	3.7	3.6	3.6	3.6	3.7
Implementation	15.4	15.1	14.7	14.3	14.3	14.7
Maintenance and support	10.1	9.8	9.4	9.1	9.1	9.1
Operations	6.8	6.8	6.7	6.7	6.8	6.9
IT training and education	3.3	3.1	3.1	3.0	3.1	2.9
Services total	39.4	38.4	37.5	36.6	36.9	37.2
Packaged software						
System infrastructure software	5.0	5.0	5.2	5.3	5.4	5.5
Appl. development and deployment	5.0	5.0	5.2	5.3	5.4	5.6
Applications	9.1	9.1	9.4	9.6	9.7	9.7
Packaged software total	19.1	19.2	19.7	20.2	20.5	20.7
Hardware						
Systems						
High-end enterprise servers	0.6	0.4	0.5	0.5	0.4	0.4
Midrange enterprise servers	1.6	1.1	1.0	1.0	0.9	0.8
Volume servers	2.8	2.3	2.1	2.1	2.1	2.0
Servers total	5.0	3.9	3.7	3.6	3.4	3.2
Personal computers	18.5	18.8	17.5	16.8	16.1	15.8
Traditional workstations	0.2	0.1	0.1	0.1	0.1	0.1
Clients total	18.5	18.8	17.5	16.8	16.1	15.8
Systems total	23.8	22.7	21.3	20.5	19.6	19.1
Storage						
Disk systems	2.1	1.9	1.8	1.8	1.7	1.7
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	2.3	2.1	2.0	2.0	1.9	1.8
Peripherals						
Printers and MFPs	5.6	7.3	7.9	7.9	7.6	7.0
Smart handheld devices	0.9	1.4	2.5	3.4	4.3	4.6
Other add-ons	1.4	1.4	1.3	1.2	1.1	1.1
Peripherals total	7.9	10.1	11.7	12.6	13.0	12.7
Networking equipment	7.6	7.5	7.8	8.2	8.0	8.5
Hardware total	41.5	42.4	42.8	43.2	42.6	42.0
Packaged software total	19.1	19.2	19.7	20.2	20.5	20.7
Services total	39.4	38.4	37.5	36.6	36.9	37.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 186

NORWAY PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.5	1.5	1.6	1.5	1.5	1.5
Implementation	1.6	1.6	1.6	1.5	1.5	1.6
Maintenance and support	1.5	1.4	1.4	1.4	1.4	1.5
Operations	1.5	1.4	1.4	1.4	1.4	1.5
IT training and education	1.9	1.8	1.9	1.9	2.0	1.9
Services total	1.5	1.5	1.5	1.5	1.5	1.5
Packaged software						
System infrastructure software	1.5	1.4	1.4	1.5	1.5	1.5
Appl. development and deployment	1.8	1.8	1.8	1.9	1.9	1.8
Applications	1.5	1.5	1.5	1.6	1.6	1.5
Packaged software total	1.5	1.5	1.6	1.6	1.6	1.5
Hardware						
Systems						
High-end enterprise servers	0.6	0.6	0.7	0.7	0.7	0.6
Midrange enterprise servers	1.7	1.4	1.4	1.3	1.2	1.7
Volume servers	2.3	2.2	1.9	1.9	1.8	2.3
Servers total	1.6	1.5	1.4	1.4	1.4	1.6
Personal computers	1.9	2.1	2.0	2.0	2.1	1.9
Traditional workstations	1.4	0.7	1.2	1.2	1.3	1.4
Clients total	1.9	2.0	2.0	2.0	2.1	1.9
Systems total	1.8	1.9	1.9	1.9	1.9	1.8
Storage						
Disk systems	1.4	1.4	1.4	1.4	1.4	1.4
Tape automation	2.1	1.9	2.0	2.0	1.9	2.1
Storage total	1.4	1.4	1.4	1.4	1.4	1.4
Peripherals						
Printers and MFPs	2.1	2.5	2.6	2.6	2.5	2.1
Smart handheld devices	1.4	1.3	1.3	1.3	1.4	1.4
Other add-ons	1.9	2.2	2.2	2.2	2.2	1.9
Peripherals total	2.0	2.2	2.1	2.0	2.0	2.0
Networking equipment	2.6	2.6	2.7	2.7	2.6	2.6
Hardware total	1.9	2.0	2.0	2.0	2.0	1.9
Packaged software total	1.5	1.5	1.6	1.6	1.6	1.5
Services total	1.5	1.5	1.5	1.5	1.5	1.5
Total IT	1.7	1.7	1.7	1.7	1.7	1.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 187

NORWAY PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.4	0.4	0.4	0.4	0.4	0.4
Implementation	0.5	0.5	0.5	0.5	0.5	0.5
Maintenance and support	0.5	0.5	0.4	0.4	0.4	0.4
Operations	0.4	0.4	0.4	0.4	0.4	0.4
IT training and education	0.7	0.6	0.6	0.6	0.7	0.6
Services total	0.5	0.5	0.5	0.4	0.4	0.4
Packaged software						
System infrastructure software	0.5	0.5	0.5	0.5	0.5	0.5
Appl. development and deployment	0.6	0.5	0.6	0.6	0.6	0.6
Applications	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.2	0.2	0.2	0.2	0.2	0.2
Midrange enterprise servers	0.5	0.4	0.3	0.3	0.3	0.3
Volume servers	0.6	0.5	0.4	0.4	0.4	0.4
Servers total	0.4	0.4	0.3	0.3	0.3	0.3
Personal computers	0.5	0.6	0.5	0.5	0.5	0.5
Traditional workstations	0.4	0.2	0.4	0.5	0.5	0.5
Clients total	0.5	0.6	0.5	0.5	0.5	0.5
Systems total	0.5	0.5	0.5	0.5	0.5	0.5
Storage						
Disk systems	0.4	0.4	0.4	0.4	0.4	0.4
Tape automation	0.3	0.3	0.3	0.3	0.3	0.2
Storage total	0.4	0.4	0.4	0.4	0.4	0.4
Peripherals						
Printers and MFPs	0.6	0.7	0.8	0.8	0.8	0.8
Smart handheld devices	0.5	0.6	0.7	0.7	0.7	0.7
Other add-ons	0.5	0.5	0.5	0.5	0.5	0.4
Peripherals total	0.6	0.7	0.7	0.7	0.7	0.7
Networking equipment	0.6	0.7	0.7	0.7	0.7	0.7
Hardware total	0.5	0.6	0.6	0.6	0.6	0.6
Packaged software total	0.5	0.5	0.5	0.5	0.5	0.5
Services total	0.5	0.5	0.5	0.4	0.4	0.4
Total IT	0.5	0.5	0.5	0.5	0.5	0.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 188

IT SPENDING IN PORTUGAL, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	68.7	73.3	78.6	86.8	96.2	105.0
Implementation	249.9	267.7	287.1	312.3	342.9	371.7
Maintenance and support	171.6	186.0	198.2	212.7	232.4	250.3
Operations	121.8	137.6	153.3	173.0	197.1	214.2
IT training and education	46.0	47.7	49.1	51.3	53.9	56.7
Services total	658.0	712.2	766.4	836.1	922.6	997.9
Packaged software						
System infrastructure software	101.0	108.2	116.8	127.5	138.2	149.6
Appl. development and deployment	95.6	96.9	101.3	109.7	118.0	127.5
Applications	183.7	186.4	195.4	213.4	231.4	246.4
Packaged software total	380.2	391.5	413.4	450.5	487.6	523.4
Hardware						
Systems						
High-end enterprise servers	19.1	11.6	14.4	11.7	10.6	10.3
Midrange enterprise servers	42.2	28.4	25.1	26.7	25.0	24.1
Volume servers	70.7	50.1	44.3	44.6	46.0	44.2
Servers total	131.9	90.0	83.8	83.0	81.6	78.5
Personal computers	568.1	533.2	522.3	548.8	581.6	603.3
Traditional workstations	1.7	1.3	1.0	1.0	0.8	0.8
Clients total	569.9	534.5	523.3	549.7	582.4	604.1
Systems total	701.8	624.5	607.1	632.8	664.0	682.6
Storage						
Disk systems	41.6	40.0	39.5	40.7	41.9	42.9
Tape automation	4.0	3.0	2.9	3.1	4.2	4.3
Storage total	45.6	43.0	42.4	43.8	46.1	47.3
Peripherals						
Printers and MFPs	200.5	269.3	294.2	312.4	322.0	317.8
Smart handheld devices	34.6	64.0	121.3	200.1	277.2	328.6
Other add-ons	44.0	42.2	43.2	43.9	45.1	45.3
Peripherals total	279.0	375.5	458.7	556.4	644.3	691.8
Networking equipment	158.7	169.5	184.2	219.6	268.5	305.2
Hardware total	1,185.1	1,212.5	1,292.4	1,452.6	1,623.0	1,726.8
Packaged software total	380.2	391.5	413.4	450.5	487.6	523.4
Services total	658.0	712.2	766.4	836.1	922.6	997.9
Total IT	2,223.3	2,316.2	2,472.2	2,739.2	3,033.1	3,248.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 189

GROWTH IN IT SPENDING IN PORTUGAL, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	6.6	7.3	10.4	10.8	9.1	9.4
Implementation	7.1	7.2	8.8	9.8	8.4	8.5
Maintenance and support	8.4	6.6	7.3	9.3	7.7	7.7
Operations	12.9	11.4	12.9	13.9	8.7	11.7
IT training and education	3.7	3.1	4.3	5.2	5.1	4.4
Services total	8.2	7.6	9.1	10.3	8.2	8.8
Packaged software						
System infrastructure software	7.1	7.9	9.2	8.4	8.3	8.4
Appl. development and deployment	1.4	4.5	8.2	7.6	8.0	7.1
Applications	1.5	4.8	9.2	8.5	6.4	7.2
Packaged software total	3.0	5.6	9.0	8.2	7.3	7.5
Hardware						
Systems						
High-end enterprise servers	-39.3	24.6	-18.8	-9.7	-3.2	-3.0
Midrange enterprise servers	-32.7	-11.6	6.6	-6.4	-3.8	-4.0
Volume servers	-29.2	-11.5	0.6	3.2	-4.0	-3.1
Servers total	-31.7	-6.9	-0.9	-1.7	-3.8	-3.4
Personal computers	-6.1	-2.0	5.1	6.0	3.7	3.1
Traditional workstations	-26.6	-24.5	-0.9	-12.0	-9.5	-12.1
Clients total	-6.1	-2.0	5.1	6.0	3.7	3.1
Systems total	-11.0	-2.8	4.2	4.9	2.8	2.2
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-26.2	-2.7	6.2	37.4	2.2	9.8
Storage total	-5.7	-1.4	3.2	5.3	2.6	2.4
Peripherals						
Printers and MFPs	34.3	9.2	6.2	3.1	-1.3	4.2
Smart handheld devices	85.1	89.7	64.9	38.6	18.5	50.6
Other add-ons	-4.1	2.4	1.7	2.6	0.4	1.8
Peripherals total	34.6	22.2	21.3	15.8	7.4	16.5
Networking equipment	6.8	8.7	19.2	22.3	13.7	15.8
Hardware total	2.3	6.6	12.4	11.7	6.4	9.2
Packaged software total	3.0	5.6	9.0	8.2	7.3	7.5
Services total	8.2	7.6	9.1	10.3	8.2	8.8
Total IT	4.2	6.7	10.8	10.7	7.1	8.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 190

PROPORTIONS OF IT SPENDING CATEGORIES IN PORTUGAL, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.1	3.2	3.2	3.2	3.2	3.2
Implementation	11.2	11.6	11.6	11.4	11.3	11.4
Maintenance and support	7.7	8.0	8.0	7.8	7.7	7.7
Operations	5.5	5.9	6.2	6.3	6.5	6.6
IT training and education	2.1	2.1	2.0	1.9	1.8	1.7
Services total	29.6	30.7	31.0	30.5	30.4	30.7
Packaged software						
System infrastructure software	4.5	4.7	4.7	4.7	4.6	4.6
Appl. development and deployment	4.3	4.2	4.1	4.0	3.9	3.9
Applications	8.3	8.0	7.9	7.8	7.6	7.6
Packaged software total	17.1	16.9	16.7	16.4	16.1	16.1
Hardware						
Systems						
High-end enterprise servers	0.9	0.5	0.6	0.4	0.3	0.3
Midrange enterprise servers	1.9	1.2	1.0	1.0	0.8	0.7
Volume servers	3.2	2.2	1.8	1.6	1.5	1.4
Servers total	5.9	3.9	3.4	3.0	2.7	2.4
Personal computers	25.6	23.0	21.1	20.0	19.2	18.6
Traditional workstations	0.1	0.1	0.0	0.0	0.0	0.0
Clients total	25.6	23.0	21.1	20.0	19.2	18.6
Systems total	31.6	27.0	24.6	23.1	21.9	21.0
Storage						
Disk systems	1.9	1.7	1.6	1.5	1.4	1.3
Tape automation	0.2	0.1	0.1	0.1	0.1	0.1
Storage total	2.1	1.9	1.7	1.6	1.5	1.5
Peripherals						
Printers and MFPs	9.0	11.6	11.9	11.4	10.6	9.8
Smart handheld devices	1.6	2.8	4.9	7.3	9.1	10.1
Other add-ons	2.0	1.8	1.7	1.6	1.5	1.4
Peripherals total	12.5	16.2	18.6	20.3	21.2	21.3
Networking equipment	7.1	7.3	7.5	8.0	8.9	9.4
Hardware total	53.3	52.3	52.3	53.0	53.5	53.2
Packaged software total	17.1	16.9	16.7	16.4	16.1	16.1
Services total	29.6	30.7	31.0	30.5	30.4	30.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 191

PORTUGAL PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.7	0.7	0.7	0.8	0.8	0.8
Implementation	0.6	0.6	0.7	0.7	0.7	0.7
Maintenance and support	0.6	0.6	0.7	0.7	0.7	0.7
Operations	0.6	0.7	0.7	0.7	0.8	0.8
IT training and education	0.6	0.6	0.7	0.7	0.7	0.7
Services total	0.6	0.6	0.7	0.7	0.7	0.7
Packaged software						
System infrastructure software	0.7	0.7	0.7	0.7	0.7	0.7
Appl. development and deployment	0.8	0.8	0.8	0.8	0.8	0.8
Applications	0.7	0.7	0.7	0.7	0.7	0.7
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.5	0.3	0.4	0.4	0.3	0.3
Midrange enterprise servers	1.0	0.8	0.7	0.7	0.7	0.6
Volume servers	1.3	1.1	0.9	0.8	0.8	0.7
Servers total	1.0	0.8	0.7	0.7	0.6	0.6
Personal computers	1.3	1.3	1.3	1.4	1.4	1.4
Traditional workstations	0.3	0.2	0.2	0.3	0.3	0.3
Clients total	1.3	1.3	1.3	1.4	1.4	1.4
Systems total	1.2	1.2	1.2	1.2	1.2	1.2
Storage						
Disk systems	0.6	0.6	0.6	0.6	0.6	0.6
Tape automation	0.8	0.7	0.7	0.7	1.0	1.0
Storage total	0.7	0.6	0.6	0.6	0.7	0.7
Peripherals						
Printers and MFPs	1.7	2.1	2.1	2.1	2.0	1.9
Smart handheld devices	1.4	1.4	1.4	1.6	1.8	1.9
Other add-ons	1.4	1.5	1.6	1.6	1.7	1.7
Peripherals total	1.6	1.9	1.8	1.8	1.9	1.9
Networking equipment	1.3	1.3	1.4	1.5	1.7	1.7
Hardware total	1.3	1.3	1.3	1.4	1.5	1.5
Packaged software total	0.7	0.7	0.7	0.7	0.7	0.7
Services total	0.6	0.6	0.7	0.7	0.7	0.7
Total IT	0.9	0.9	0.9	1.0	1.0	1.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 192

PORTUGAL PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.2	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.2	0.2	0.2	0.2	0.2	0.2
IT training and education	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.3	0.2	0.2	0.2	0.2	0.2
Volume servers	0.3	0.2	0.2	0.2	0.2	0.2
Servers total	0.3	0.2	0.2	0.2	0.2	0.1
Personal computers	0.4	0.4	0.3	0.4	0.4	0.4
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	0.4	0.4	0.3	0.3	0.4	0.4
Systems total	0.3	0.3	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.5	0.6	0.7	0.7	0.7	0.6
Smart handheld devices	0.5	0.6	0.7	0.9	0.9	0.9
Other add-ons	0.3	0.4	0.4	0.4	0.4	0.3
Peripherals total	0.5	0.6	0.6	0.7	0.7	0.7
Networking equipment	0.3	0.3	0.4	0.4	0.4	0.5
Hardware total	0.3	0.4	0.4	0.4	0.4	0.4
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Total IT	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 193

IT SPENDING IN SPAIN, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	417.1	446.8	480.6	530.4	593.6	655.1
Implementation	1,640.2	1,747.5	1,852.1	2,014.9	2,220.3	2,410.7
Maintenance and support	1,062.1	1,132.3	1,197.0	1,290.2	1,419.8	1,543.8
Operations	718.4	782.9	863.5	973.4	1,108.7	1,227.9
IT training and education	312.1	329.5	347.1	365.5	392.1	419.9
Services total	4,150.0	4,439.0	4,740.3	5,174.4	5,734.4	6,257.4
Packaged software						
System infrastructure software	557.8	584.6	622.4	664.8	717.8	771.4
Appl. development and deployment	434.5	446.9	467.8	502.9	539.2	587.2
Applications	948.6	971.4	1,020.6	1,098.2	1,177.8	1,253.8
Packaged software total	1,940.9	2,002.8	2,110.7	2,265.9	2,434.8	2,612.3
Hardware						
Systems						
High-end enterprise servers	166.4	177.2	183.4	172.1	163.4	164.0
Midrange enterprise servers	202.0	204.5	194.1	210.4	232.7	259.4
Volume servers	249.5	278.3	328.9	361.0	412.5	428.2
Servers total	617.8	660.0	706.4	743.6	808.7	851.5
Personal computers	2,330.4	2,603.4	2,693.0	2,874.1	2,980.6	3,167.8
Traditional workstations	18.1	12.7	11.2	9.3	7.8	6.8
Clients total	2,348.5	2,616.2	2,704.2	2,883.4	2,988.5	3,174.6
Systems total	2,966.3	3,276.1	3,410.6	3,627.0	3,797.1	4,026.2
Storage						
Disk systems	304.1	292.9	289.1	297.8	306.3	314.2
Tape automation	16.4	11.7	12.5	13.4	18.1	18.2
Storage total	320.5	304.5	301.6	311.3	324.3	332.4
Peripherals						
Printers and MFPs	661.7	827.1	892.7	943.1	983.3	987.6
Smart handheld devices	176.7	349.6	715.2	1,067.9	1,377.5	1,596.6
Other add-ons	187.6	182.4	178.4	184.2	184.9	190.2
Peripherals total	1,026.0	1,359.1	1,786.3	2,195.2	2,545.7	2,774.5
Networking equipment	754.5	774.3	804.6	891.3	1,044.2	1,161.3
Hardware total	5,067.3	5,714.0	6,303.1	7,024.7	7,711.3	8,294.3
Packaged software total	1,940.9	2,002.8	2,110.7	2,265.9	2,434.8	2,612.3
Services total	4,150.0	4,439.0	4,740.3	5,174.4	5,734.4	6,257.4
Total IT	11,158.2	12,155.9	13,154.2	14,465.0	15,880.5	17,164.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 194

GROWTH IN IT SPENDING IN SPAIN, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	7.1	7.6	10.4	11.9	10.4	10.0
Implementation	6.5	6.0	8.8	10.2	8.6	8.4
Maintenance and support	6.6	5.7	7.8	10.0	8.7	8.1
Operations	9.0	10.3	12.7	13.9	10.8	11.9
IT training and education	5.6	5.3	5.3	7.3	7.1	6.2
Services total	7.0	6.8	9.2	10.8	9.1	9.0
Packaged software						
System infrastructure software	4.8	6.5	6.8	8.0	7.5	7.2
Appl. development and deployment	2.9	4.7	7.5	7.2	8.9	7.1
Applications	2.4	5.1	7.6	7.2	6.4	6.6
Packaged software total	3.2	5.4	7.4	7.5	7.3	6.9
Hardware						
Systems						
High-end enterprise servers	6.5	3.5	-6.1	-5.1	0.3	-1.9
Midrange enterprise servers	1.2	-5.1	8.4	10.6	11.5	6.1
Volume servers	11.5	18.2	9.8	14.3	3.8	11.4
Servers total	6.8	7.0	5.3	8.8	5.3	6.6
Personal computers	11.7	3.4	6.7	3.7	6.3	5.0
Traditional workstations	-29.5	-11.9	-17.1	-15.7	-13.3	-14.5
Clients total	11.7	3.4	6.7	3.7	6.3	5.0
Systems total	10.4	4.1	6.3	4.7	6.0	5.3
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-28.6	6.9	7.3	34.6	0.6	11.6
Storage total	-5.0	-1.0	3.2	4.2	2.5	2.2
Peripherals						
Printers and MFPs	25.0	7.9	5.6	4.3	0.4	4.5
Smart handheld devices	97.8	104.5	49.3	29.0	15.9	46.2
Other add-ons	-2.8	-2.2	3.3	0.4	2.9	1.1
Peripherals total	32.5	31.4	22.9	16.0	9.0	19.5
Networking equipment	2.6	3.9	10.8	17.1	11.2	10.7
Hardware total	12.8	10.3	11.4	9.8	7.6	9.8
Packaged software total	3.2	5.4	7.4	7.5	7.3	6.9
Services total	7.0	6.8	9.2	10.8	9.1	9.0
Total IT	8.9	8.2	10.0	9.8	8.1	9.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 195

PROPORTIONS OF IT SPENDING CATEGORIES IN SPAIN, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.7	3.7	3.7	3.7	3.7	3.8
Implementation	14.7	14.4	14.1	13.9	14.0	14.0
Maintenance and support	9.5	9.3	9.1	8.9	8.9	9.0
Operations	6.4	6.4	6.6	6.7	7.0	7.2
IT training and education	2.8	2.7	2.6	2.5	2.5	2.4
Services total	37.2	36.5	36.0	35.8	36.1	36.5
Packaged software						
System infrastructure software	5.0	4.8	4.7	4.6	4.5	4.5
Appl. development and deployment	3.9	3.7	3.6	3.5	3.4	3.4
Applications	8.5	8.0	7.8	7.6	7.4	7.3
Packaged software total	17.4	16.5	16.0	15.7	15.3	15.2
Hardware						
Systems						
High-end enterprise servers	1.5	1.5	1.4	1.2	1.0	1.0
Midrange enterprise servers	1.8	1.7	1.5	1.5	1.5	1.5
Volume servers	2.2	2.3	2.5	2.5	2.6	2.5
Servers total	5.5	5.4	5.4	5.1	5.1	5.0
Personal computers	20.9	21.4	20.5	19.9	18.8	18.5
Traditional workstations	0.2	0.1	0.1	0.1	0.0	0.0
Clients total	20.9	21.4	20.5	19.9	18.8	18.5
Systems total	26.6	27.0	25.9	25.1	23.9	23.5
Storage						
Disk systems	2.7	2.4	2.2	2.1	1.9	1.8
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	2.9	2.5	2.3	2.2	2.0	1.9
Peripherals						
Printers and MFPs	5.9	6.8	6.8	6.5	6.2	5.8
Smart handheld devices	1.6	2.9	5.4	7.4	8.7	9.3
Other add-ons	1.7	1.5	1.4	1.3	1.2	1.1
Peripherals total	9.2	11.2	13.6	15.2	16.0	16.2
Networking equipment	6.8	6.4	6.1	6.2	6.6	6.8
Hardware total	45.4	47.0	47.9	48.6	48.6	48.3
Packaged software total	17.4	16.5	16.0	15.7	15.3	15.2
Services total	37.2	36.5	36.0	35.8	36.1	36.5
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 196

SPAIN PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.9	4.2	4.5	4.7	5.0	5.2
Implementation	3.8	4.1	4.3	4.5	4.7	4.8
Maintenance and support	3.6	3.8	3.9	4.1	4.3	4.4
Operations	3.6	3.8	4.0	4.2	4.4	4.6
IT training and education	4.1	4.4	4.6	4.8	4.9	5.1
Services total	3.8	4.0	4.2	4.4	4.6	4.7
Packaged software						
System infrastructure software	3.8	3.8	3.8	3.7	3.8	3.8
Appl. development and deployment	3.6	3.7	3.6	3.7	3.6	3.6
Applications	3.6	3.6	3.6	3.7	3.7	3.7
Packaged software total	3.7	3.7	3.7	3.7	3.7	3.7
Hardware						
Systems						
High-end enterprise servers	4.2	5.2	5.4	5.3	5.3	5.5
Midrange enterprise servers	4.9	6.0	5.6	5.5	6.1	6.5
Volume servers	4.7	5.9	6.6	6.5	6.7	6.8
Servers total	4.6	5.7	6.0	5.9	6.2	6.4
Personal computers	5.5	6.5	6.9	7.2	7.4	7.6
Traditional workstations	2.7	2.2	2.5	2.4	2.4	2.4
Clients total	5.4	6.4	6.8	7.1	7.4	7.6
Systems total	5.2	6.2	6.6	6.9	7.1	7.3
Storage						
Disk systems	4.7	4.7	4.7	4.7	4.7	4.7
Tape automation	3.4	2.7	2.9	3.1	4.2	4.1
Storage total	4.6	4.6	4.6	4.6	4.7	4.7
Peripherals						
Printers and MFPs	5.8	6.5	6.4	6.3	6.2	6.0
Smart handheld devices	6.9	7.6	8.4	8.6	8.9	9.0
Other add-ons	5.9	6.3	6.5	6.8	7.1	7.2
Peripherals total	6.0	6.7	7.1	7.3	7.5	7.5
Networking equipment	6.0	6.1	6.0	6.1	6.4	6.6
Hardware total	5.4	6.2	6.5	6.7	7.0	7.1
Packaged software total	3.7	3.7	3.7	3.7	3.7	3.7
Services total	3.8	4.0	4.2	4.4	4.6	4.7
Total IT	4.3	4.7	4.9	5.1	5.2	5.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 197

SPAIN PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.1	1.2	1.3	1.3	1.4	1.4
Implementation	1.2	1.3	1.3	1.4	1.4	1.4
Maintenance and support	1.1	1.2	1.2	1.2	1.2	1.3
Operations	1.1	1.1	1.2	1.2	1.3	1.3
IT training and education	1.4	1.5	1.6	1.6	1.6	1.7
Services total	1.2	1.2	1.3	1.3	1.4	1.4
Packaged software						
System infrastructure software	1.2	1.2	1.2	1.2	1.2	1.2
Appl. development and deployment	1.1	1.1	1.1	1.1	1.1	1.1
Applications	1.1	1.1	1.1	1.1	1.1	1.1
Packaged software total	1.1	1.1	1.1	1.1	1.1	1.1
Hardware						
Systems						
High-end enterprise servers	1.2	1.5	1.6	1.5	1.5	1.5
Midrange enterprise servers	1.4	1.5	1.4	1.4	1.6	1.7
Volume servers	1.2	1.3	1.4	1.4	1.5	1.5
Servers total	1.3	1.4	1.4	1.4	1.5	1.5
Personal computers	1.5	1.8	1.8	1.8	1.9	1.9
Traditional workstations	0.8	0.8	0.9	0.9	0.9	0.9
Clients total	1.5	1.8	1.8	1.8	1.9	1.9
Systems total	1.4	1.7	1.7	1.7	1.8	1.8
Storage						
Disk systems	1.4	1.4	1.4	1.3	1.3	1.3
Tape automation	0.6	0.4	0.4	0.4	0.5	0.5
Storage total	1.3	1.3	1.2	1.2	1.2	1.2
Peripherals						
Printers and MFPs	1.6	1.9	2.0	2.0	2.0	2.0
Smart handheld devices	2.4	3.2	4.3	4.6	4.7	4.5
Other add-ons	1.5	1.6	1.5	1.5	1.5	1.5
Peripherals total	1.7	2.1	2.4	2.7	2.8	2.8
Networking equipment	1.5	1.6	1.5	1.6	1.7	1.7
Hardware total	1.5	1.7	1.8	1.9	2.0	2.0
Packaged software total	1.1	1.1	1.1	1.1	1.1	1.1
Services total	1.2	1.2	1.3	1.3	1.4	1.4
Total IT	1.3	1.4	1.4	1.5	1.5	1.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 198

IT SPENDING IN SWEDEN, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	393.6	390.5	397.0	415.8	449.8	484.7
Implementation	1,701.1	1,688.4	1,708.5	1,776.0	1,910.0	2,058.4
Maintenance and support	1,019.1	1,033.8	1,052.8	1,093.4	1,164.3	1,253.2
Operations	713.8	765.1	803.6	851.0	914.5	986.0
IT training and education	312.4	305.3	301.7	304.5	318.3	322.8
Services total	4,139.9	4,183.2	4,263.5	4,440.6	4,757.0	5,105.2
Packaged software						
System infrastructure software	457.2	473.2	506.6	540.2	582.0	621.0
Appl. development and deployment	490.3	507.9	540.8	580.3	625.4	678.8
Applications	921.1	951.7	1,006.4	1,072.8	1,142.7	1,215.4
Packaged software total	1,868.6	1,932.8	2,053.8	2,193.3	2,350.2	2,515.2
Hardware						
Systems						
High-end enterprise servers	51.5	31.8	40.2	37.8	38.0	39.4
Midrange enterprise servers	120.7	104.6	102.9	111.5	112.8	116.9
Volume servers	208.6	180.5	179.5	187.9	199.1	199.5
Servers total	380.8	316.9	322.6	337.2	349.8	355.9
Personal computers	1,789.8	1,448.2	1,370.0	1,348.6	1,347.3	1,395.5
Traditional workstations	34.0	22.2	22.4	18.6	15.7	13.7
Clients total	1,823.8	1,470.3	1,392.4	1,367.3	1,363.0	1,409.1
Systems total	2,204.6	1,787.2	1,715.0	1,704.5	1,712.9	1,765.0
Storage						
Disk systems	179.8	173.1	170.9	176.1	181.0	185.7
Tape automation	17.4	17.0	17.3	17.9	17.6	17.7
Storage total	197.1	190.1	188.3	194.0	198.6	203.5
Peripherals						
Printers and MFPs	371.1	410.4	479.8	540.8	604.4	650.3
Smart handheld devices	78.8	111.5	211.6	337.2	435.6	499.6
Other add-ons	137.8	112.5	99.9	95.1	91.8	91.9
Peripherals total	587.7	634.4	791.3	973.0	1,131.8	1,241.8
Networking equipment	612.1	615.5	639.6	690.4	718.0	771.9
Hardware total	3,601.6	3,227.3	3,334.2	3,561.9	3,761.3	3,982.1
Packaged software total	1,868.6	1,932.8	2,053.8	2,193.3	2,350.2	2,515.2
Services total	4,139.9	4,183.2	4,263.5	4,440.6	4,757.0	5,105.2
Total IT	9,610.1	9,343.2	9,651.5	10,195.8	10,868.5	11,602.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 199

GROWTH IN IT SPENDING IN SWEDEN, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-0.8	1.7	4.7	8.2	7.8	5.6
Implementation	-0.7	1.2	4.0	7.5	7.8	5.1
Maintenance and support	1.4	1.8	3.9	6.5	7.6	4.9
Operations	7.2	5.0	5.9	7.5	7.8	6.5
IT training and education	-2.2	-1.2	0.9	4.5	1.4	1.4
Services total	1.0	1.9	4.2	7.1	7.3	5.1
Packaged software						
System infrastructure software	3.5	7.1	6.6	7.7	6.7	7.0
Appl. development and deployment	3.6	6.5	7.3	7.8	8.5	7.5
Applications	3.3	5.7	6.6	6.5	6.4	6.3
Packaged software total	3.4	6.3	6.8	7.2	7.0	6.8
Hardware						
Systems						
High-end enterprise servers	-38.3	26.7	-6.0	0.5	3.8	5.6
Midrange enterprise servers	-13.4	-1.6	8.4	1.1	3.7	2.8
Volume servers	-13.5	-0.6	4.7	6.0	0.2	2.5
Servers total	-16.8	1.8	4.5	3.7	1.7	2.9
Personal computers	-19.1	-5.4	-1.6	-0.1	3.6	-0.9
Traditional workstations	-34.8	1.0	-16.9	-15.6	-13.1	-11.4
Clients total	-19.1	-5.4	-1.6	-0.1	3.6	-0.9
Systems total	-18.9	-4.0	-0.6	0.5	3.0	-0.3
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-1.9	1.8	3.4	-1.8	0.8	1.0
Storage total	-3.5	-1.0	3.0	2.4	2.4	1.7
Peripherals						
Printers and MFPs	10.6	16.9	12.7	11.8	7.6	12.2
Smart handheld devices	41.5	89.8	59.3	29.2	14.7	45.5
Other add-ons	-18.3	-11.2	-4.9	-3.4	0.1	-4.9
Peripherals total	7.9	24.7	23.0	16.3	9.7	18.3
Networking equipment	0.6	3.9	7.9	4.0	7.5	5.8
Hardware total	-10.4	3.3	6.8	5.6	5.9	5.4
Packaged software total	3.4	6.3	6.8	7.2	7.0	6.8
Services total	1.0	1.9	4.2	7.1	7.3	5.1
Total IT	-2.8	3.3	5.6	6.6	6.8	5.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 200

PROPORTIONS OF IT SPENDING CATEGORIES IN SWEDEN, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.1	4.2	4.1	4.1	4.1	4.2
Implementation	17.7	18.1	17.7	17.4	17.6	17.7
Maintenance and support	10.6	11.1	10.9	10.7	10.7	10.8
Operations	7.4	8.2	8.3	8.3	8.4	8.5
IT training and education	3.3	3.3	3.1	3.0	2.9	2.8
Services total	43.1	44.8	44.2	43.6	43.8	44.0
Packaged software						
System infrastructure software	4.8	5.1	5.2	5.3	5.4	5.4
Appl. development and deployment	5.1	5.4	5.6	5.7	5.8	5.9
Applications	9.6	10.2	10.4	10.5	10.5	10.5
Packaged software total	19.4	20.7	21.3	21.5	21.6	21.7
Hardware						
Systems						
High-end enterprise servers	0.5	0.3	0.4	0.4	0.3	0.3
Midrange enterprise servers	1.3	1.1	1.1	1.1	1.0	1.0
Volume servers	2.2	1.9	1.9	1.8	1.8	1.7
Servers total	4.0	3.4	3.3	3.3	3.2	3.1
Personal computers	18.6	15.5	14.2	13.2	12.4	12.0
Traditional workstations	0.4	0.2	0.2	0.2	0.1	0.1
Clients total	18.6	15.5	14.2	13.2	12.4	12.0
Systems total	22.9	19.1	17.8	16.7	15.8	15.2
Storage						
Disk systems	1.9	1.9	1.8	1.7	1.7	1.6
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	2.1	2.0	2.0	1.9	1.8	1.8
Peripherals						
Printers and MFPs	3.9	4.4	5.0	5.3	5.6	5.6
Smart handheld devices	0.8	1.2	2.2	3.3	4.0	4.3
Other add-ons	1.4	1.2	1.0	0.9	0.8	0.8
Peripherals total	6.1	6.8	8.2	9.5	10.4	10.7
Networking equipment	6.4	6.6	6.6	6.8	6.6	6.7
Hardware total	37.5	34.5	34.5	34.9	34.6	34.3
Packaged software total	19.4	20.7	21.3	21.5	21.6	21.7
Services total	43.1	44.8	44.2	43.6	43.8	44.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 201

SWEDEN PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.7	3.7	3.7	3.7	3.8	3.8
Implementation	4.0	4.0	3.9	4.0	4.0	4.1
Maintenance and support	3.4	3.4	3.5	3.5	3.5	3.6
Operations	3.6	3.7	3.7	3.7	3.7	3.7
IT training and education	4.1	4.0	4.0	4.0	4.0	3.9
Services total	3.7	3.7	3.7	3.7	3.8	3.8
Packaged software						
System infrastructure software	3.1	3.0	3.1	3.0	3.1	3.0
Appl. development and deployment	4.1	4.1	4.2	4.2	4.2	4.2
Applications	3.5	3.5	3.6	3.6	3.6	3.6
Packaged software total	3.5	3.5	3.6	3.6	3.6	3.6
Hardware						
Systems						
High-end enterprise servers	1.3	0.9	1.2	1.2	1.2	1.3
Midrange enterprise servers	3.0	3.1	3.0	2.9	3.0	2.9
Volume servers	3.9	3.8	3.6	3.4	3.3	3.2
Servers total	2.9	2.7	2.7	2.7	2.7	2.7
Personal computers	4.2	3.6	3.5	3.4	3.4	3.3
Traditional workstations	5.1	3.9	4.9	4.9	4.9	4.9
Clients total	4.2	3.6	3.5	3.4	3.4	3.4
Systems total	3.9	3.4	3.3	3.2	3.2	3.2
Storage						
Disk systems	2.8	2.8	2.8	2.8	2.8	2.8
Tape automation	3.6	4.0	4.1	4.2	4.1	4.0
Storage total	2.8	2.9	2.9	2.9	2.9	2.9
Peripherals						
Printers and MFPs	3.2	3.2	3.4	3.6	3.8	3.9
Smart handheld devices	3.1	2.4	2.5	2.7	2.8	2.8
Other add-ons	4.3	3.9	3.6	3.5	3.5	3.5
Peripherals total	3.4	3.1	3.1	3.2	3.3	3.4
Networking equipment	4.8	4.9	4.8	4.7	4.4	4.4
Hardware total	3.9	3.5	3.4	3.4	3.4	3.4
Packaged software total	3.5	3.5	3.6	3.6	3.6	3.6
Services total	3.7	3.7	3.7	3.7	3.8	3.8
Total IT	3.7	3.6	3.6	3.6	3.6	3.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 202

SWEDEN PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.1	1.1	1.0	1.0	1.0	1.1
Implementation	1.3	1.3	1.2	1.2	1.2	1.2
Maintenance and support	1.1	1.1	1.1	1.0	1.0	1.0
Operations	1.1	1.1	1.1	1.1	1.1	1.1
IT training and education	1.4	1.4	1.4	1.4	1.3	1.3
Services total	1.2	1.2	1.1	1.1	1.1	1.1
Packaged software						
System infrastructure software	1.0	1.0	1.0	1.0	1.0	1.0
Appl. development and deployment	1.3	1.3	1.3	1.3	1.3	1.3
Applications	1.1	1.1	1.1	1.1	1.1	1.1
Packaged software total	1.1	1.1	1.1	1.1	1.1	1.1
Hardware						
Systems						
High-end enterprise servers	0.4	0.3	0.4	0.3	0.3	0.4
Midrange enterprise servers	0.8	0.8	0.7	0.8	0.8	0.7
Volume servers	1.0	0.8	0.7	0.7	0.7	0.7
Servers total	0.8	0.7	0.7	0.7	0.6	0.6
Personal computers	1.2	1.0	0.9	0.9	0.8	0.8
Traditional workstations	1.4	1.3	1.7	1.8	1.8	1.8
Clients total	1.2	1.0	0.9	0.9	0.8	0.9
Systems total	1.1	0.9	0.9	0.8	0.8	0.8
Storage						
Disk systems	0.8	0.8	0.8	0.8	0.8	0.8
Tape automation	0.6	0.6	0.6	0.6	0.5	0.5
Storage total	0.8	0.8	0.8	0.8	0.8	0.7
Peripherals						
Printers and MFPs	0.9	1.0	1.1	1.2	1.2	1.3
Smart handheld devices	1.1	1.0	1.3	1.5	1.5	1.4
Other add-ons	1.1	1.0	0.9	0.8	0.7	0.7
Peripherals total	1.0	1.0	1.1	1.2	1.3	1.3
Networking equipment	1.2	1.2	1.2	1.2	1.2	1.1
Hardware total	1.1	1.0	0.9	1.0	1.0	1.0
Packaged software total	1.1	1.1	1.1	1.1	1.1	1.1
Services total	1.2	1.2	1.1	1.1	1.1	1.1
Total IT	1.1	1.1	1.1	1.1	1.1	1.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 203

IT SPENDING IN SWITZERLAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	411.9	410.8	422.7	445.9	481.1	516.6
Implementation	1,525.5	1,527.4	1,570.6	1,649.6	1,769.6	1,886.7
Maintenance and support	1,076.0	1,087.1	1,103.6	1,146.6	1,213.5	1,289.6
Operations	724.1	758.0	793.9	840.4	905.2	972.9
IT training and education	287.9	284.6	287.9	296.4	316.9	338.0
Services total	4,025.3	4,067.9	4,178.8	4,378.8	4,686.3	5,003.8
Packaged software						
System infrastructure software	582.7	621.7	662.4	703.8	745.8	801.4
Appl. development and deployment	440.5	445.9	469.5	504.3	546.0	594.8
Applications	1,050.2	1,040.4	1,083.6	1,157.4	1,229.2	1,308.4
Packaged software total	2,073.4	2,108.0	2,215.5	2,365.5	2,521.0	2,704.6
Hardware						
Systems						
High-end enterprise servers	137.6	120.7	132.8	121.6	115.4	114.4
Midrange enterprise servers	198.0	188.0	181.7	197.0	207.9	226.7
Volume servers	237.1	217.1	247.5	284.2	321.2	334.1
Servers total	572.7	525.8	562.0	602.8	644.5	675.2
Personal computers	1,468.2	1,456.5	1,444.6	1,484.6	1,518.9	1,517.5
Traditional workstations	24.1	14.6	14.5	11.4	9.6	8.3
Clients total	1,492.3	1,471.1	1,459.1	1,496.0	1,528.6	1,525.9
Systems total	2,065.0	1,996.9	2,021.1	2,098.8	2,173.1	2,201.1
Storage						
Disk systems	325.4	313.4	309.4	318.7	327.7	336.3
Tape automation	25.7	18.1	19.4	20.9	24.3	24.8
Storage total	351.1	331.4	328.8	339.6	352.0	361.1
Peripherals						
Printers and MFPs	433.4	490.5	559.6	609.4	654.0	685.1
Smart handheld devices	111.0	199.3	370.8	524.4	397.1	434.0
Other add-ons	114.2	103.9	99.3	98.8	97.9	94.8
Peripherals total	658.6	793.7	1,029.7	1,232.7	1,149.0	1,213.8
Networking equipment	479.0	454.3	460.4	485.5	520.0	552.0
Hardware total	3,553.6	3,576.4	3,839.9	4,156.6	4,194.1	4,327.9
Packaged software total	2,073.4	2,108.0	2,215.5	2,365.5	2,521.0	2,704.6
Services total	4,025.3	4,067.9	4,178.8	4,378.8	4,686.3	5,003.8
Total IT	9,652.4	9,752.2	10,234.2	10,900.9	11,401.4	12,036.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 204

GROWTH IN IT SPENDING IN SWITZERLAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-0.3	2.9	5.5	7.9	7.4	5.9
Implementation	0.1	2.8	5.0	7.3	6.6	5.4
Maintenance and support	1.0	1.5	3.9	5.8	6.3	4.4
Operations	4.7	4.7	5.9	7.7	7.5	6.4
IT training and education	-1.2	1.2	2.9	6.9	6.7	4.4
Services total	1.1	2.7	4.8	7.0	6.8	5.3
Packaged software						
System infrastructure software	6.7	6.6	6.2	6.0	7.5	6.6
Appl. development and deployment	1.2	5.3	7.4	8.3	8.9	7.5
Applications	-0.9	4.2	6.8	6.2	6.4	5.9
Packaged software total	1.7	5.1	6.8	6.6	7.3	6.4
Hardware						
Systems						
High-end enterprise servers	-12.3	10.0	-8.4	-5.1	-0.9	-1.3
Midrange enterprise servers	-5.1	-3.3	8.4	5.5	9.0	4.8
Volume servers	-8.4	14.0	14.8	13.0	4.0	11.4
Servers total	-8.2	6.9	7.3	6.9	4.8	6.4
Personal computers	-0.8	-0.8	2.8	2.3	-0.1	1.0
Traditional workstations	-39.5	-0.9	-20.9	-15.7	-13.5	-13.0
Clients total	-0.8	-0.8	2.8	2.3	-0.1	1.0
Systems total	-3.3	1.2	3.8	3.5	1.3	2.5
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-29.6	7.2	7.9	16.3	2.1	8.3
Storage total	-5.6	-0.8	3.3	3.7	2.6	2.2
Peripherals						
Printers and MFPs	13.2	14.1	8.9	7.3	4.8	8.7
Smart handheld devices	79.5	86.0	41.4	-24.3	9.3	21.5
Other add-ons	-9.0	-4.5	-0.4	-0.9	-3.2	-2.3
Peripherals total	20.5	29.7	19.7	-6.8	5.6	11.2
Networking equipment	-5.2	1.3	5.4	7.1	6.1	5.0
Hardware total	0.6	7.4	8.2	0.9	3.2	4.9
Packaged software total	1.7	5.1	6.8	6.6	7.3	6.4
Services total	1.1	2.7	4.8	7.0	6.8	5.3
Total IT	1.0	4.9	6.5	4.6	5.6	5.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 205

PROPORTIONS OF IT SPENDING CATEGORIES IN SWITZERLAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.2	4.1	4.1	4.2	4.3
Implementation	15.8	15.7	15.3	15.1	15.5	15.7
Maintenance and support	11.1	11.1	10.8	10.5	10.6	10.7
Operations	7.5	7.8	7.8	7.7	7.9	8.1
IT training and education	3.0	2.9	2.8	2.7	2.8	2.8
Services total	41.7	41.7	40.8	40.2	41.1	41.6
Packaged software						
System infrastructure software	6.0	6.4	6.5	6.5	6.5	6.7
Appl. development and deployment	4.6	4.6	4.6	4.6	4.8	4.9
Applications	10.9	10.7	10.6	10.6	10.8	10.9
Packaged software total	21.5	21.6	21.6	21.7	22.1	22.5
Hardware						
Systems						
High-end enterprise servers	1.4	1.2	1.3	1.1	1.0	1.0
Midrange enterprise servers	2.1	1.9	1.8	1.8	1.8	1.9
Volume servers	2.5	2.2	2.4	2.6	2.8	2.8
Servers total	5.9	5.4	5.5	5.5	5.7	5.6
Personal computers	15.2	14.9	14.1	13.6	13.3	12.6
Traditional workstations	0.2	0.1	0.1	0.1	0.1	0.1
Clients total	15.2	14.9	14.1	13.6	13.3	12.6
Systems total	21.4	20.5	19.7	19.3	19.1	18.3
Storage						
Disk systems	3.4	3.2	3.0	2.9	2.9	2.8
Tape automation	0.3	0.2	0.2	0.2	0.2	0.2
Storage total	3.6	3.4	3.2	3.1	3.1	3.0
Peripherals						
Printers and MFPs	4.5	5.0	5.5	5.6	5.7	5.7
Smart handheld devices	1.2	2.0	3.6	4.8	3.5	3.6
Other add-ons	1.2	1.1	1.0	0.9	0.9	0.8
Peripherals total	6.8	8.1	10.1	11.3	10.1	10.1
Networking equipment	5.0	4.7	4.5	4.5	4.6	4.6
Hardware total	36.8	36.7	37.5	38.1	36.8	36.0
Packaged software total	21.5	21.6	21.6	21.7	22.1	22.5
Services total	41.7	41.7	40.8	40.2	41.1	41.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 206

SWITZERLAND PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.9	3.9	3.9	4.0	4.0	4.1
Implementation	3.6	3.6	3.6	3.7	3.7	3.7
Maintenance and support	3.6	3.6	3.6	3.6	3.6	3.7
Operations	3.6	3.6	3.6	3.6	3.6	3.6
IT training and education	3.8	3.8	3.8	3.9	3.9	4.1
Services total	3.6	3.6	3.7	3.7	3.7	3.7
Packaged software						
System infrastructure software	4.0	4.0	4.0	4.0	3.9	3.9
Appl. development and deployment	3.7	3.6	3.7	3.7	3.7	3.7
Applications	4.0	3.9	3.9	3.9	3.8	3.8
Packaged software total	3.9	3.9	3.9	3.9	3.8	3.8
Hardware						
Systems						
High-end enterprise servers	3.5	3.5	3.9	3.8	3.8	3.8
Midrange enterprise servers	4.8	5.5	5.3	5.2	5.5	5.7
Volume servers	4.5	4.6	4.9	5.2	5.2	5.3
Servers total	4.3	4.5	4.7	4.8	5.0	5.1
Personal computers	3.5	3.6	3.7	3.7	3.8	3.6
Traditional workstations	3.6	2.6	3.2	3.0	3.0	3.0
Clients total	3.5	3.6	3.7	3.7	3.8	3.6
Systems total	3.7	3.8	3.9	4.0	4.1	4.0
Storage						
Disk systems	5.0	5.0	5.0	5.0	5.0	5.0
Tape automation	5.4	4.2	4.5	4.9	5.6	5.6
Storage total	5.1	5.0	5.0	5.0	5.1	5.1
Peripherals						
Printers and MFPs	3.8	3.9	4.0	4.1	4.1	4.1
Smart handheld devices	4.3	4.4	4.3	4.2	2.6	2.5
Other add-ons	3.6	3.6	3.6	3.7	3.7	3.6
Peripherals total	3.8	3.9	4.1	4.1	3.4	3.3
Networking equipment	3.8	3.6	3.5	3.3	3.2	3.1
Hardware total	3.8	3.9	4.0	4.0	3.8	3.7
Packaged software total	3.9	3.9	3.9	3.9	3.8	3.8
Services total	3.6	3.6	3.7	3.7	3.7	3.7
Total IT	3.8	3.8	3.8	3.8	3.8	3.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 207

SWITZERLAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.1	1.1	1.1	1.1	1.1	1.1
Implementation	1.1	1.1	1.1	1.1	1.1	1.1
Maintenance and support	1.2	1.1	1.1	1.1	1.1	1.0
Operations	1.1	1.1	1.1	1.1	1.0	1.0
IT training and education	1.3	1.3	1.3	1.3	1.3	1.3
Services total	1.1	1.1	1.1	1.1	1.1	1.1
Packaged software						
System infrastructure software	1.3	1.3	1.3	1.3	1.3	1.3
Appl. development and deployment	1.1	1.1	1.1	1.1	1.1	1.1
Applications	1.2	1.2	1.2	1.2	1.2	1.2
Packaged software total	1.2	1.2	1.2	1.2	1.2	1.2
Hardware						
Systems						
High-end enterprise servers	1.0	1.0	1.2	1.1	1.0	1.0
Midrange enterprise servers	1.3	1.4	1.3	1.3	1.4	1.4
Volume servers	1.1	1.0	1.0	1.1	1.1	1.1
Servers total	1.2	1.1	1.1	1.2	1.2	1.2
Personal computers	1.0	1.0	1.0	0.9	0.9	0.9
Traditional workstations	1.0	0.9	1.1	1.1	1.1	1.1
Clients total	1.0	1.0	1.0	0.9	0.9	0.9
Systems total	1.0	1.0	1.0	1.0	1.0	1.0
Storage						
Disk systems	1.5	1.5	1.4	1.4	1.4	1.4
Tape automation	0.9	0.6	0.6	0.7	0.7	0.7
Storage total	1.4	1.4	1.3	1.3	1.3	1.3
Peripherals						
Printers and MFPs	1.1	1.1	1.2	1.3	1.4	1.4
Smart handheld devices	1.5	1.8	2.2	2.3	1.4	1.2
Other add-ons	0.9	0.9	0.8	0.8	0.8	0.7
Peripherals total	1.1	1.2	1.4	1.5	1.3	1.2
Networking equipment	0.9	0.9	0.9	0.9	0.8	0.8
Hardware total	1.0	1.1	1.1	1.1	1.1	1.0
Packaged software total	1.2	1.2	1.2	1.2	1.2	1.2
Services total	1.1	1.1	1.1	1.1	1.1	1.1
Total IT	1.1	1.1	1.1	1.1	1.1	1.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 208

IT SPENDING IN THE UNITED KINGDOM, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2,462.1	2,462.3	2,471.5	2,557.5	2,715.8	2,873.2
Implementation	10,202.8	10,222.0	10,297.7	10,674.3	11,323.5	12,011.0
Maintenance and support	7,195.0	7,281.3	7,375.6	7,685.9	8,151.5	8,636.5
Operations	4,808.0	5,038.6	5,254.4	5,553.9	5,983.5	6,388.5
IT training and education	1,453.1	1,450.1	1,448.3	1,490.9	1,567.9	1,606.5
Services total	26,121.1	26,454.3	26,847.5	27,962.6	29,742.3	31,515.7
Packaged software						
System infrastructure software	3,248.6	3,483.1	3,765.0	4,034.5	4,275.4	4,634.5
Appl. development and deployment	2,501.6	2,571.2	2,709.7	2,890.6	3,167.2	3,424.2
Applications	6,073.2	6,145.5	6,250.5	6,634.8	7,112.5	7,581.4
Packaged software total	11,823.4	12,199.8	12,725.2	13,559.9	14,555.1	15,640.0
Hardware						
Systems						
High-end enterprise servers	712.2	564.8	551.9	530.9	521.5	516.7
Midrange enterprise servers	754.8	595.8	599.4	659.5	649.3	666.9
Volume servers	1,038.5	906.5	943.2	1,010.9	1,111.5	1,134.8
Servers total	2,505.4	2,067.1	2,094.4	2,201.4	2,282.3	2,318.4
Personal computers	9,024.4	8,625.9	8,613.2	8,543.6	8,491.1	8,832.9
Traditional workstations	119.2	87.5	84.2	71.1	60.7	53.2
Clients total	9,143.6	8,713.4	8,697.5	8,614.7	8,551.7	8,886.1
Systems total	11,649.1	10,780.5	10,791.9	10,816.1	10,834.0	11,204.5
Storage						
Disk systems	1,367.2	1,316.6	1,299.9	1,339.0	1,376.9	1,412.7
Tape automation	117.3	111.5	112.0	114.0	101.5	104.2
Storage total	1,484.5	1,428.1	1,411.9	1,453.0	1,478.4	1,517.0
Peripherals						
Printers and MFPs	1,964.9	2,028.8	2,269.8	2,482.0	2,698.1	2,824.8
Smart handheld devices	614.2	1,074.7	1,879.7	2,594.5	3,142.4	3,438.8
Other add-ons	618.5	541.4	508.8	488.5	469.8	473.0
Peripherals total	3,197.6	3,644.9	4,658.3	5,565.0	6,310.3	6,736.6
Networking equipment	2,582.7	2,611.3	2,742.1	2,998.6	3,237.6	3,456.1
Hardware total	18,913.9	18,464.8	19,604.2	20,832.6	21,860.4	22,914.1
Packaged software total	11,823.4	12,199.8	12,725.2	13,559.9	14,555.1	15,640.0
Services total	26,121.1	26,454.3	26,847.5	27,962.6	29,742.3	31,515.7
Total IT	56,858.4	57,118.9	59,176.9	62,355.1	66,157.8	70,069.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 209

GROWTH IN IT SPENDING IN THE UNITED KINGDOM, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	0.0	0.4	3.5	6.2	5.8	3.9
Implementation	0.2	0.7	3.7	6.1	6.1	4.1
Maintenance and support	1.2	1.3	4.2	6.1	5.9	4.4
Operations	4.8	4.3	5.7	7.7	6.8	6.1
IT training and education	-0.2	-0.1	2.9	5.2	2.5	2.6
Services total	1.3	1.5	4.2	6.4	6.0	4.5
Packaged software						
System infrastructure software	7.2	8.1	7.2	6.0	8.4	7.4
Appl. development and deployment	2.8	5.4	6.7	9.6	8.1	7.4
Applications	1.2	1.7	6.1	7.2	6.6	5.4
Packaged software total	3.2	4.3	6.6	7.3	7.5	6.4
Hardware						
Systems						
High-end enterprise servers	-20.7	-2.3	-3.8	-1.8	-0.9	-2.2
Midrange enterprise servers	-21.1	0.6	10.0	-1.5	2.7	2.9
Volume servers	-12.7	4.0	7.2	9.9	2.1	5.8
Servers total	-17.5	1.3	5.1	3.7	1.6	2.9
Personal computers	-4.4	-0.1	-0.8	-0.6	4.0	0.6
Traditional workstations	-26.6	-3.8	-15.6	-14.7	-12.2	-11.7
Clients total	-4.4	-0.1	-0.8	-0.6	4.0	0.6
Systems total	-7.5	0.1	0.2	0.2	3.4	1.0
Storage						
Disk systems	-3.7	-1.3	3.0	2.8	2.6	1.8
Tape automation	-4.9	0.4	1.8	-10.9	2.7	-1.7
Storage total	-3.8	-1.1	2.9	1.8	2.6	1.5
Peripherals						
Printers and MFPs	3.3	11.9	9.4	8.7	4.7	8.6
Smart handheld devices	75.0	74.9	38.0	21.1	9.4	33.7
Other add-ons	-12.5	-6.0	-4.0	-3.8	0.7	-3.3
Peripherals total	14.0	27.8	19.5	13.4	6.8	16.6
Networking equipment	1.1	5.0	9.4	8.0	6.7	7.3
Hardware total	-2.4	6.2	6.3	4.9	4.8	5.5
Packaged software total	3.2	4.3	6.6	7.3	7.5	6.4
Services total	1.3	1.5	4.2	6.4	6.0	4.5
Total IT	0.5	3.6	5.4	6.1	5.9	5.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 210

PROPORTIONS OF IT SPENDING CATEGORIES IN THE UNITED KINGDOM, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.3	4.2	4.1	4.1	4.1
Implementation	17.9	17.9	17.4	17.1	17.1	17.1
Maintenance and support	12.7	12.7	12.5	12.3	12.3	12.3
Operations	8.5	8.8	8.9	8.9	9.0	9.1
IT training and education	2.6	2.5	2.4	2.4	2.4	2.3
Services total	45.9	46.3	45.4	44.8	45.0	45.0
Packaged software						
System infrastructure software	5.7	6.1	6.4	6.5	6.5	6.6
Appl. development and deployment	4.4	4.5	4.6	4.6	4.8	4.9
Applications	10.7	10.8	10.6	10.6	10.8	10.8
Packaged software total	20.8	21.4	21.5	21.7	22.0	22.3
Hardware						
Systems						
High-end enterprise servers	1.3	1.0	0.9	0.9	0.8	0.7
Midrange enterprise servers	1.3	1.0	1.0	1.1	1.0	1.0
Volume servers	1.8	1.6	1.6	1.6	1.7	1.6
Servers total	4.4	3.6	3.5	3.5	3.4	3.3
Personal computers	15.9	15.1	14.6	13.7	12.8	12.6
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	15.9	15.1	14.6	13.7	12.8	12.6
Systems total	20.5	18.9	18.2	17.3	16.4	16.0
Storage						
Disk systems	2.4	2.3	2.2	2.1	2.1	2.0
Tape automation	0.2	0.2	0.2	0.2	0.2	0.1
Storage total	2.6	2.5	2.4	2.3	2.2	2.2
Peripherals						
Printers and MFPs	3.5	3.6	3.8	4.0	4.1	4.0
Smart handheld devices	1.1	1.9	3.2	4.2	4.7	4.9
Other add-ons	1.1	0.9	0.9	0.8	0.7	0.7
Peripherals total	5.6	6.4	7.9	8.9	9.5	9.6
Networking equipment	4.5	4.6	4.6	4.8	4.9	4.9
Hardware total	33.3	32.3	33.1	33.4	33.0	32.7
Packaged software total	20.8	21.4	21.5	21.7	22.0	22.3
Services total	45.9	46.3	45.4	44.8	45.0	45.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 211

UNITED KINGDOM PROPORTIONS OF THE IT SPENDING IN WESTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	23.3	23.3	23.1	22.9	22.8	22.6
Implementation	23.9	24.0	23.8	23.8	23.8	23.7
Maintenance and support	24.3	24.2	24.2	24.4	24.4	24.5
Operations	24.1	24.2	24.2	24.0	23.9	23.8
IT training and education	19.0	19.2	19.2	19.4	19.5	19.4
Services total	23.7	23.7	23.6	23.6	23.6	23.6
Packaged software						
System infrastructure software	22.1	22.4	22.7	22.7	22.5	22.6
Appl. development and deployment	21.0	21.0	21.1	21.0	21.3	21.2
Applications	22.9	22.8	22.3	22.2	22.2	22.2
Packaged software total	22.3	22.3	22.1	22.1	22.1	22.1
Hardware						
Systems						
High-end enterprise servers	18.0	16.6	16.2	16.4	17.0	17.3
Midrange enterprise servers	18.4	17.5	17.3	17.4	17.0	16.8
Volume servers	19.5	19.1	18.8	18.3	18.2	18.1
Servers total	18.8	17.9	17.6	17.6	17.6	17.5
Personal computers	21.2	21.4	21.9	21.3	21.1	21.2
Traditional workstations	18.0	15.4	18.4	18.7	18.8	19.0
Clients total	21.2	21.3	21.9	21.3	21.1	21.2
Systems total	20.6	20.6	20.9	20.4	20.2	20.3
Storage						
Disk systems	21.1	21.1	21.1	21.1	21.1	21.1
Tape automation	24.5	26.1	26.3	26.5	23.4	23.5
Storage total	21.4	21.5	21.5	21.5	21.3	21.3
Peripherals						
Printers and MFPs	17.1	16.0	16.3	16.6	16.9	17.1
Smart handheld devices	24.0	23.5	22.0	20.9	20.3	19.4
Other add-ons	19.5	18.7	18.6	18.1	17.9	18.0
Peripherals total	18.6	18.1	18.4	18.5	18.5	18.3
Networking equipment	20.4	20.6	20.6	20.4	19.9	19.6
Hardware total	20.3	20.1	20.3	19.9	19.7	19.6
Packaged software total	22.3	22.3	22.1	22.1	22.1	22.1
Services total	23.7	23.7	23.6	23.6	23.6	23.6
Total IT	22.1	22.1	22.1	21.9	21.9	21.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 212

UNITED KINGDOM PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	6.7	6.7	6.5	6.4	6.3	6.3
Implementation	7.6	7.6	7.4	7.3	7.2	7.2
Maintenance and support	7.8	7.6	7.4	7.2	7.1	7.0
Operations	7.3	7.2	7.1	6.9	6.9	6.9
IT training and education	6.7	6.8	6.7	6.6	6.6	6.3
Services total	7.5	7.4	7.2	7.1	7.0	6.9
Packaged software						
System infrastructure software	7.1	7.3	7.4	7.4	7.2	7.3
Appl. development and deployment	6.4	6.4	6.4	6.4	6.4	6.4
Applications	7.1	7.0	6.7	6.7	6.7	6.7
Packaged software total	6.9	6.9	6.8	6.8	6.8	6.8
Hardware						
Systems						
High-end enterprise servers	5.3	4.8	4.8	4.7	4.7	4.7
Midrange enterprise servers	5.1	4.4	4.3	4.5	4.4	4.3
Volume servers	4.9	4.1	3.9	3.9	4.0	3.9
Servers total	5.1	4.4	4.2	4.3	4.2	4.1
Personal computers	5.8	5.9	5.7	5.5	5.3	5.4
Traditional workstations	5.1	5.2	6.5	6.8	6.9	6.8
Clients total	5.8	5.9	5.7	5.5	5.3	5.4
Systems total	5.7	5.5	5.4	5.2	5.0	5.1
Storage						
Disk systems	6.3	6.2	6.1	6.0	6.0	5.9
Tape automation	4.0	3.8	3.7	3.6	3.0	2.9
Storage total	6.1	5.9	5.8	5.7	5.6	5.5
Peripherals						
Printers and MFPs	4.8	4.7	5.0	5.3	5.6	5.7
Smart handheld devices	8.2	9.8	11.3	11.2	10.7	9.7
Other add-ons	4.9	4.7	4.3	4.0	3.7	3.6
Peripherals total	5.2	5.6	6.3	6.8	7.0	6.8
Networking equipment	5.1	5.3	5.3	5.3	5.2	5.1
Hardware total	5.5	5.5	5.6	5.6	5.5	5.5
Packaged software total	6.9	6.9	6.8	6.8	6.8	6.8
Services total	7.5	7.4	7.2	7.1	7.0	6.9
Total IT	6.6	6.6	6.5	6.4	6.4	6.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

ASIA/PACIFIC

The Asia/Pacific IT market is caught in the crosscurrents of positive and negative macroeconomic dynamics. The Iraq war, SARS, terrorism, and the sluggish global economy have all contributed to weaker IT spending through their impact on local economic conditions and corporate profits. However, buoyant economic activity in China and India, and to a lesser extent in Australia and Thailand, is propelling healthy IT spending increases in those countries. And the region continues to enjoy positive underlying IT fundamentals, including low rates of IT penetration and superior long-term economic growth prospects. IDC anticipates a recovery in IT spending in the second half of 2003, albeit a muted and uneven one, as the negative fallout from SARS begins to fade and global economic conditions improve. Technology investment should accelerate appreciably in 2004 and beyond, assuming a full recovery in the global economy.

The Asia/Pacific IT market is caught in the crosscurrents of positive and negative macroeconomic dynamics.

Japan's IT market continues to shrink, a victim of the country's chronic economic malaise. Business investment is constrained by weak profits, tight credit, and a general absence of liquidity in the corporate sector. Japanese households' willingness to dip into savings to support consumption has not extended to PC purchases, perhaps because they are considered to be more discretionary. Yet the news is not all bad. Though IT spending is expected to contract in 2003, the rate of decline is slowing. Corporate purchases of PCs, servers, and storage are stabilizing following a steep plunge in 2002. The software market is receiving some support from a secular shift among Japanese companies away from custom, mainframe-based systems toward shrink-wrapped, off-the-shelf packages. Spending on IT services is suffering from a lack of new projects, but the outsourcing business is benefiting from corporate cost cutting and a growing cultural acceptance of the practice of pushing IT responsibilities outside the enterprise.

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In the rest of Asia/Pacific, recent IT market developments have been mixed. Disk storage revenue posted an 11% decline in 1Q03, but server spending saw a 7% advance and PC shipments growth was in the double digits. Overall, the technology market appears to be mending from the 2002 downturn, but the recovery is following a checkered pattern. Not surprisingly, the key differentiator between countries is local economic conditions. The countries boasting superior rates of GDP growth — China, India, Australia, and Thailand in particular — are also the countries with the most vibrant IT markets. Hong Kong and Singapore have had a more difficult time coping with the SARS outbreak and weak global demand, and this is reflected in negative IT spending growth. In the middle are countries such as Indonesia, Malaysia, and the Philippines, where economic activity has held up better and IT spending has been correspondingly firmer.

The countries boasting superior rates of GDP growth — China, India, Australia, and Thailand in particular — are also the countries with the most vibrant IT markets.

Over the medium term, the outlook for IT spending in Asia/Pacific is exceedingly bright. The region is characterized by low rates of IT penetration (technology makes up only 2% of GDP, compared with 3.5% in North America) and (outside Japan) deregulation, restructuring, and high rates of long-run economic growth. These factors lay the foundation for extraordinary opportunities for IT vendors. Over our forecast horizon, we expect to see IT spending achieve double-digit growth reminiscent of the dot-com boom in the West. The difference is, unlike the dot-com bubble, growth will be supported by solid demographic and economic fundamentals, ensuring a more durable market opportunity.

Despite attractive opportunities in the long term, the reality is that short-term prospects for IT will be dictated by economic developments. In this regard, although we are optimistic that a U.S. recovery in the second half of 2003 will translate into firmer economic conditions in Asia/Pacific, the rebound will come with a lag. Furthermore, Japan's economy will continue to struggle with its internal demons. As a result, although IT spending is expected to register a positive increase in 2003, the recovery will be muted. Assuming the global recovery plays according to script, the region is poised to achieve robust rates of IT spending growth in 2004 and beyond.

Assuming the global recovery plays according to script, the region is poised to achieve robust rates of IT spending growth in 2004 and beyond.

Tables 213–296 illustrate IT spending forecasts for Asia/Pacific, with country-level detail for Australia, China, Hong Kong, India, Indonesia, Japan, Korea, Malaysia, New Zealand, the Philippines, Singapore, Taiwan, Thailand, and Vietnam.

TABLE 213

IT SPENDING IN ASIA/PACIFIC, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5,777.9	5,926.1	6,337.6	6,824.8	7,399.6	8,067.7
Implementation	21,024.5	21,687.1	23,338.6	25,231.0	27,452.3	29,967.6
Maintenance and support	13,070.3	13,304.3	13,849.6	14,623.8	15,655.9	16,847.2
Operations	10,879.3	11,506.4	12,285.7	13,318.4	14,585.0	16,048.3
IT training and education	2,999.1	3,089.5	3,331.4	3,637.4	3,964.0	4,345.9
Services total	53,751.1	55,513.5	59,142.9	63,635.3	69,056.7	75,276.7
Packaged software						
System infrastructure software	8,697.0	9,220.6	10,062.4	11,005.4	12,049.7	13,114.4
Appl. development and deployment	5,315.6	5,423.1	5,791.4	6,330.9	7,009.1	7,737.6
Applications	9,446.3	9,766.6	10,506.7	11,471.0	12,616.9	13,944.7
Packaged software total	23,458.9	24,410.3	26,360.5	28,807.3	31,675.6	34,796.7
Hardware						
Systems						
High-end enterprise servers	4,077.4	4,102.5	3,864.7	3,616.8	3,512.2	3,216.4
Midrange enterprise servers	4,547.4	3,861.9	4,177.5	4,253.6	4,250.2	4,456.1
Volume servers	4,777.7	4,965.8	5,436.3	5,937.1	6,512.1	7,181.5
Servers total	13,402.5	12,930.2	13,478.4	13,807.5	14,274.5	14,853.9
Personal computers	41,859.9	41,468.7	43,915.7	47,611.8	51,531.5	55,302.3
Traditional workstations	420.3	315.2	272.8	234.1	208.1	188.6
Clients total	42,280.2	41,783.9	44,188.5	47,845.9	51,739.6	55,490.9
Systems total	55,682.8	54,714.0	57,666.9	61,653.3	66,014.0	70,344.8
Storage						
Disk systems	5,324.0	5,086.3	5,259.6	5,484.0	5,705.0	5,856.8
Tape automation	756.2	778.0	812.9	854.0	890.5	926.1
Storage total	6,080.2	5,864.3	6,072.5	6,338.1	6,595.6	6,782.8
Peripherals						
Printers and MFPs	8,247.9	8,937.8	9,431.1	10,018.3	10,491.0	11,064.7
Smart handheld devices	1,549.7	1,867.9	2,448.2	3,090.9	3,854.7	4,810.6
Other add-ons	3,490.1	3,166.1	3,449.7	3,774.6	4,100.7	4,479.0
Peripherals total	13,287.7	13,971.8	15,329.0	16,883.9	18,446.4	20,354.3
Networking equipment	9,845.1	9,559.4	10,191.1	11,225.3	12,617.3	13,912.8
Hardware total	84,895.8	84,109.6	89,259.5	96,100.6	103,673.3	111,394.8
Packaged software total	23,458.9	24,410.3	26,360.5	28,807.3	31,675.6	34,796.7
Services total	53,751.1	55,513.5	59,142.9	63,635.3	69,056.7	75,276.7
Total IT	162,105.9	164,033.4	174,762.9	188,543.2	204,405.6	221,468.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 214

GROWTH IN IT SPENDING IN ASIA/PACIFIC, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	2.6	6.9	7.7	8.4	9.0	8.0
Implementation	3.2	7.6	8.1	8.8	9.2	8.4
Maintenance and support	1.8	4.1	5.6	7.1	7.6	6.1
Operations	5.8	6.8	8.4	9.5	10.0	8.7
IT training and education	3.0	7.8	9.2	9.0	9.6	8.9
Services total	3.3	6.5	7.6	8.5	9.0	7.9
Packaged software						
System infrastructure software	6.0	9.1	9.4	9.5	8.8	9.2
Appl. development and deployment	2.0	6.8	9.3	10.7	10.4	9.3
Applications	3.4	7.6	9.2	10.0	10.5	9.3
Packaged software total	4.1	8.0	9.3	10.0	9.9	9.3
Hardware						
Systems						
High-end enterprise servers	0.6	-5.8	-6.4	-2.9	-8.4	-5.9
Midrange enterprise servers	-15.1	8.2	1.8	-0.1	4.8	3.6
Volume servers	3.9	9.5	9.2	9.7	10.3	9.7
Servers total	-3.5	4.2	2.4	3.4	4.1	3.5
Personal computers	-0.9	5.9	8.4	8.2	7.3	7.5
Traditional workstations	-25.0	-13.4	-14.2	-11.1	-9.4	-12.0
Clients total	-0.9	5.9	8.4	8.2	7.3	7.5
Systems total	-1.7	5.4	6.9	7.1	6.6	6.5
Storage						
Disk systems	-4.5	3.4	4.3	4.0	2.7	3.6
Tape automation	2.9	4.5	5.1	4.3	4.0	4.5
Storage total	-3.6	3.5	4.4	4.1	2.8	3.7
Peripherals						
Printers and MFPs	8.4	5.5	6.2	4.7	5.5	5.5
Smart handheld devices	20.5	31.1	26.3	24.7	24.8	26.7
Other add-ons	-9.3	9.0	9.4	8.6	9.2	9.1
Peripherals total	5.1	9.7	10.1	9.3	10.3	9.9
Networking equipment	-2.9	6.6	10.1	12.4	10.3	9.8
Hardware total	-0.9	6.1	7.7	7.9	7.4	7.3
Packaged software total	4.1	8.0	9.3	10.0	9.9	9.3
Services total	3.3	6.5	7.6	8.5	9.0	7.9
Total IT	1.2	6.5	7.9	8.4	8.3	7.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 215

PROPORTIONS OF IT SPENDING CATEGORIES IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.6	3.6	3.6	3.6	3.6	3.6
Implementation	13.0	13.2	13.4	13.4	13.4	13.5
Maintenance and support	8.1	8.1	7.9	7.8	7.7	7.6
Operations	6.7	7.0	7.0	7.1	7.1	7.2
IT training and education	1.9	1.9	1.9	1.9	1.9	2.0
Services total	33.2	33.8	33.8	33.8	33.8	34.0
Packaged software						
System infrastructure software	5.4	5.6	5.8	5.8	5.9	5.9
Appl. development and deployment	3.3	3.3	3.3	3.4	3.4	3.5
Applications	5.8	6.0	6.0	6.1	6.2	6.3
Packaged software total	14.5	14.9	15.1	15.3	15.5	15.7
Hardware						
Systems						
High-end enterprise servers	2.5	2.5	2.2	1.9	1.7	1.5
Midrange enterprise servers	2.8	2.4	2.4	2.3	2.1	2.0
Volume servers	2.9	3.0	3.1	3.1	3.2	3.2
Servers total	8.3	7.9	7.7	7.3	7.0	6.7
Personal computers	25.8	25.3	25.1	25.3	25.2	25.0
Traditional workstations	0.3	0.2	0.2	0.1	0.1	0.1
Clients total	25.8	25.3	25.1	25.3	25.2	25.0
Systems total	34.3	33.4	33.0	32.7	32.3	31.8
Storage						
Disk systems	3.3	3.1	3.0	2.9	2.8	2.6
Tape automation	0.5	0.5	0.5	0.5	0.4	0.4
Storage total	3.8	3.6	3.5	3.4	3.2	3.1
Peripherals						
Printers and MFPs	5.1	5.4	5.4	5.3	5.1	5.0
Smart handheld devices	1.0	1.1	1.4	1.6	1.9	2.2
Other add-ons	2.2	1.9	2.0	2.0	2.0	2.0
Peripherals total	8.2	8.5	8.8	9.0	9.0	9.2
Networking equipment	6.1	5.8	5.8	6.0	6.2	6.3
Hardware total	52.4	51.3	51.1	51.0	50.7	50.3
Packaged software total	14.5	14.9	15.1	15.3	15.5	15.7
Services total	33.2	33.8	33.8	33.8	33.8	34.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 216

ASIA/PACIFIC PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	15.6	16.0	16.6	16.9	17.2	17.6
Implementation	15.8	16.2	16.8	17.2	17.5	17.9
Maintenance and support	14.1	13.9	13.8	13.7	13.6	13.7
Operations	16.6	16.5	16.5	16.7	16.9	17.3
IT training and education	13.8	14.4	15.3	16.2	16.6	17.1
Services total	15.4	15.5	15.8	16.1	16.3	16.6
Packaged software						
System infrastructure software	19.1	19.4	19.9	20.2	20.4	20.5
Appl. development and deployment	13.6	13.5	13.7	13.9	14.2	14.4
Applications	11.0	11.1	11.3	11.5	11.8	12.3
Packaged software total	13.7	13.9	14.2	14.4	14.7	15.1
Hardware						
Systems						
High-end enterprise servers	30.5	34.7	33.7	32.2	31.4	29.4
Midrange enterprise servers	30.8	28.7	29.8	29.0	28.8	28.5
Volume servers	22.7	22.6	22.6	23.1	23.2	24.4
Servers total	27.2	27.4	27.2	26.7	26.4	26.5
Personal computers	27.1	28.2	29.2	30.4	32.1	33.6
Traditional workstations	17.9	18.8	21.2	22.3	23.7	24.2
Clients total	27.0	28.1	29.1	30.3	32.1	33.6
Systems total	27.0	27.9	28.7	29.5	30.7	31.8
Storage						
Disk systems	24.7	24.1	24.6	24.7	24.7	24.5
Tape automation	25.8	26.4	26.7	26.8	26.6	26.2
Storage total	24.8	24.4	24.9	25.0	24.9	24.8
Peripherals						
Printers and MFPs	20.1	20.7	21.0	21.5	21.7	22.3
Smart handheld devices	20.7	17.1	14.7	13.4	13.1	13.5
Other add-ons	27.5	27.4	29.4	31.3	32.2	34.2
Peripherals total	21.7	21.3	20.9	20.6	20.4	20.7
Networking equipment	19.5	19.3	19.6	19.9	20.4	20.5
Hardware total	24.8	25.1	25.4	25.8	26.3	26.9
Packaged software total	13.7	13.9	14.2	14.4	14.7	15.1
Services total	15.4	15.5	15.8	16.1	16.3	16.6
Total IT	18.8	18.9	19.2	19.5	19.8	20.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 217

IT SPENDING IN AUSTRALIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	359.8	354.3	371.2	393.5	414.7	439.7
Implementation	1,663.6	1,650.0	1,746.7	1,857.1	1,988.0	2,129.3
Maintenance and support	828.8	850.5	875.0	914.7	955.4	992.4
Operations	2,513.6	2,681.0	2,888.0	3,183.2	3,554.3	4,005.4
IT training and education	109.2	116.3	124.5	138.0	149.5	160.9
Services total	5,475.0	5,652.2	6,005.4	6,486.4	7,062.0	7,727.7
Packaged software						
System infrastructure software	708.1	698.5	715.2	762.1	814.4	867.8
Appl. development and deployment	585.0	563.9	606.3	652.1	707.5	765.5
Applications	1,002.6	944.2	992.6	1,063.3	1,153.4	1,246.3
Packaged software total	2,295.6	2,206.7	2,314.2	2,477.6	2,675.2	2,879.6
Hardware						
Systems						
High-end enterprise servers	126.0	100.9	92.6	90.5	97.1	102.0
Midrange enterprise servers	175.3	182.9	216.0	239.9	246.6	251.1
Volume servers	460.5	446.9	465.0	473.5	491.9	517.5
Servers total	761.7	730.7	773.7	804.0	835.7	870.6
Personal computers	2,885.6	3,120.3	3,070.7	3,000.2	2,875.4	2,790.2
Traditional workstations	14.5	9.9	8.4	6.7	6.0	5.5
Clients total	2,900.0	3,130.2	3,079.0	3,006.9	2,881.4	2,795.7
Systems total	3,661.8	3,860.9	3,852.7	3,810.9	3,717.0	3,666.4
Storage						
Disk systems	391.6	372.2	385.2	413.8	456.9	466.8
Tape automation	60.3	57.4	58.1	59.0	60.3	61.6
Storage total	451.9	429.6	443.2	472.9	517.1	528.4
Peripherals						
Printers and MFPs	401.7	384.3	373.5	358.7	343.0	327.1
Smart handheld devices	59.9	81.8	90.0	92.4	106.2	133.0
Other add-ons	297.8	290.7	303.2	315.0	330.6	348.3
Peripherals total	759.4	756.8	766.8	766.1	779.8	808.5
Networking equipment	619.4	583.5	631.8	663.1	719.7	788.6
Hardware total	5,492.5	5,630.8	5,694.6	5,713.0	5,733.6	5,791.8
Packaged software total	2,295.6	2,206.7	2,314.2	2,477.6	2,675.2	2,879.6
Services total	5,475.0	5,652.2	6,005.4	6,486.4	7,062.0	7,727.7
Total IT	13,263.2	13,489.7	14,014.2	14,676.9	15,470.8	16,399.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 218

GROWTH IN IT SPENDING IN AUSTRALIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.5	4.8	6.0	5.4	6.0	5.5
Implementation	-0.8	5.9	6.3	7.1	7.1	6.6
Maintenance and support	2.6	2.9	4.5	4.5	3.9	3.9
Operations	6.7	7.7	10.2	11.7	12.7	10.6
IT training and education	6.5	7.0	10.9	8.3	7.6	8.4
Services total	3.2	6.2	8.0	8.9	9.4	8.1
Packaged software						
System infrastructure software	-1.3	2.4	6.6	6.9	6.6	5.6
Appl. development and deployment	-3.6	7.5	7.6	8.5	8.2	7.9
Applications	-5.8	5.1	7.1	8.5	8.1	7.2
Packaged software total	-3.9	4.9	7.1	8.0	7.6	6.9
Hardware						
Systems						
High-end enterprise servers	-19.9	-8.2	-2.3	7.2	5.1	0.3
Midrange enterprise servers	4.3	18.1	11.1	2.8	1.8	8.2
Volume servers	-2.9	4.1	1.8	3.9	5.2	3.7
Servers total	-4.1	5.9	3.9	3.9	4.2	4.5
Personal computers	8.1	-1.6	-2.3	-4.2	-3.0	-2.8
Traditional workstations	-31.6	-15.5	-20.1	-10.0	-8.4	-13.6
Clients total	8.1	-1.6	-2.3	-4.2	-3.0	-2.8
Systems total	5.4	-0.2	-1.1	-2.5	-1.4	-1.3
Storage						
Disk systems	-4.9	3.5	7.4	10.4	2.2	5.8
Tape automation	-4.9	1.2	1.6	2.1	2.3	1.8
Storage total	-4.9	3.2	6.7	9.4	2.2	5.3
Peripherals						
Printers and MFPs	-4.3	-2.8	-4.0	-4.4	-4.6	-3.9
Smart handheld devices	36.6	10.1	2.7	14.9	25.2	12.9
Other add-ons	-2.4	4.3	3.9	4.9	5.4	4.6
Peripherals total	-0.3	1.3	-0.1	1.8	3.7	1.7
Networking equipment	-5.8	8.3	5.0	8.5	9.6	7.8
Hardware total	2.5	1.1	0.3	0.4	1.0	0.7
Packaged software total	-3.9	4.9	7.1	8.0	7.6	6.9
Services total	3.2	6.2	8.0	8.9	9.4	8.1
Total IT	1.7	3.9	4.7	5.4	6.0	5.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 219

PROPORTIONS OF IT SPENDING CATEGORIES IN AUSTRALIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.7	2.6	2.6	2.7	2.7	2.7
Implementation	12.5	12.2	12.5	12.7	12.9	13.0
Maintenance and support	6.2	6.3	6.2	6.2	6.2	6.1
Operations	19.0	19.9	20.6	21.7	23.0	24.4
IT training and education	0.8	0.9	0.9	0.9	1.0	1.0
Services total	41.3	41.9	42.9	44.2	45.6	47.1
Packaged software						
System infrastructure software	5.3	5.2	5.1	5.2	5.3	5.3
Appl. development and deployment	4.4	4.2	4.3	4.4	4.6	4.7
Applications	7.6	7.0	7.1	7.2	7.5	7.6
Packaged software total	17.3	16.4	16.5	16.9	17.3	17.6
Hardware						
Systems						
High-end enterprise servers	0.9	0.7	0.7	0.6	0.6	0.6
Midrange enterprise servers	1.3	1.4	1.5	1.6	1.6	1.5
Volume servers	3.5	3.3	3.3	3.2	3.2	3.2
Servers total	5.7	5.4	5.5	5.5	5.4	5.3
Personal computers	21.8	23.1	21.9	20.4	18.6	17.0
Traditional workstations	0.1	0.1	0.1	0.0	0.0	0.0
Clients total	21.8	23.1	21.9	20.4	18.6	17.0
Systems total	27.6	28.6	27.5	26.0	24.0	22.4
Storage						
Disk systems	3.0	2.8	2.7	2.8	3.0	2.8
Tape automation	0.5	0.4	0.4	0.4	0.4	0.4
Storage total	3.4	3.2	3.2	3.2	3.3	3.2
Peripherals						
Printers and MFPs	3.0	2.8	2.7	2.4	2.2	2.0
Smart handheld devices	0.5	0.6	0.6	0.6	0.7	0.8
Other add-ons	2.2	2.2	2.2	2.1	2.1	2.1
Peripherals total	5.7	5.6	5.5	5.2	5.0	4.9
Networking equipment	4.7	4.3	4.5	4.5	4.7	4.8
Hardware total	41.4	41.7	40.6	38.9	37.1	35.3
Packaged software total	17.3	16.4	16.5	16.9	17.3	17.6
Services total	41.3	41.9	42.9	44.2	45.6	47.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 220

AUSTRALIA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	6.2	6.0	5.9	5.8	5.6	5.4
Implementation	7.9	7.6	7.5	7.4	7.2	7.1
Maintenance and support	6.3	6.4	6.3	6.3	6.1	5.9
Operations	23.1	23.3	23.5	23.9	24.4	25.0
IT training and education	3.6	3.8	3.7	3.8	3.8	3.7
Services total	10.2	10.2	10.2	10.2	10.2	10.3
Packaged software						
System infrastructure software	8.1	7.6	7.1	6.9	6.8	6.6
Appl. development and deployment	11.0	10.4	10.5	10.3	10.1	9.9
Applications	10.6	9.7	9.4	9.3	9.1	8.9
Packaged software total	9.8	9.0	8.8	8.6	8.4	8.3
Hardware						
Systems						
High-end enterprise servers	3.1	2.5	2.4	2.5	2.8	3.2
Midrange enterprise servers	3.9	4.7	5.2	5.6	5.8	5.6
Volume servers	9.6	9.0	8.6	8.0	7.6	7.2
Servers total	5.7	5.7	5.7	5.8	5.9	5.9
Personal computers	6.9	7.5	7.0	6.3	5.6	5.0
Traditional workstations	3.4	3.1	3.1	2.9	2.9	2.9
Clients total	6.9	7.5	7.0	6.3	5.6	5.0
Systems total	6.6	7.1	6.7	6.2	5.6	5.2
Storage						
Disk systems	7.4	7.3	7.3	7.5	8.0	8.0
Tape automation	8.0	7.4	7.1	6.9	6.8	6.7
Storage total	7.4	7.3	7.3	7.5	7.8	7.8
Peripherals						
Printers and MFPs	4.9	4.3	4.0	3.6	3.3	3.0
Smart handheld devices	3.9	4.4	3.7	3.0	2.8	2.8
Other add-ons	8.5	9.2	8.8	8.3	8.1	7.8
Peripherals total	5.7	5.4	5.0	4.5	4.2	4.0
Networking equipment	6.3	6.1	6.2	5.9	5.7	5.7
Hardware total	6.5	6.7	6.4	5.9	5.5	5.2
Packaged software total	9.8	9.0	8.8	8.6	8.4	8.3
Services total	10.2	10.2	10.2	10.2	10.2	10.3
Total IT	8.2	8.2	8.0	7.8	7.6	7.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 221

AUSTRALIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.0	1.0	1.0	1.0	1.0	1.0
Implementation	1.2	1.2	1.3	1.3	1.3	1.3
Maintenance and support	0.9	0.9	0.9	0.9	0.8	0.8
Operations	3.8	3.9	3.9	4.0	4.1	4.3
IT training and education	0.5	0.5	0.6	0.6	0.6	0.6
Services total	1.6	1.6	1.6	1.6	1.7	1.7
Packaged software						
System infrastructure software	1.6	1.5	1.4	1.4	1.4	1.4
Appl. development and deployment	1.5	1.4	1.4	1.4	1.4	1.4
Applications	1.2	1.1	1.1	1.1	1.1	1.1
Packaged software total	1.3	1.3	1.2	1.2	1.2	1.2
Hardware						
Systems						
High-end enterprise servers	0.9	0.9	0.8	0.8	0.9	0.9
Midrange enterprise servers	1.2	1.4	1.5	1.6	1.7	1.6
Volume servers	2.2	2.0	1.9	1.8	1.8	1.8
Servers total	1.5	1.5	1.6	1.6	1.5	1.6
Personal computers	1.9	2.1	2.0	1.9	1.8	1.7
Traditional workstations	0.6	0.6	0.6	0.6	0.7	0.7
Clients total	1.8	2.1	2.0	1.9	1.8	1.7
Systems total	1.8	2.0	1.9	1.8	1.7	1.7
Storage						
Disk systems	1.8	1.8	1.8	1.9	2.0	2.0
Tape automation	2.1	1.9	1.9	1.9	1.8	1.7
Storage total	1.8	1.8	1.8	1.9	2.0	1.9
Peripherals						
Printers and MFPs	1.0	0.9	0.8	0.8	0.7	0.7
Smart handheld devices	0.8	0.7	0.5	0.4	0.4	0.4
Other add-ons	2.3	2.5	2.6	2.6	2.6	2.7
Peripherals total	1.2	1.2	1.0	0.9	0.9	0.8
Networking equipment	1.2	1.2	1.2	1.2	1.2	1.2
Hardware total	1.6	1.7	1.6	1.5	1.5	1.4
Packaged software total	1.3	1.3	1.2	1.2	1.2	1.2
Services total	1.6	1.6	1.6	1.6	1.7	1.7
Total IT	1.5	1.6	1.5	1.5	1.5	1.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 222

IT SPENDING IN CHINA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	423.9	521.8	686.9	902.8	1,176.2	1,499.3
Implementation	1,787.9	2,177.9	2,789.4	3,553.6	4,498.3	5,583.6
Maintenance and support	929.7	1,050.4	1,280.0	1,557.2	1,879.2	2,238.4
Operations	91.9	134.6	205.1	302.6	435.0	603.4
IT training and education	442.4	498.0	651.0	806.0	960.2	1,132.7
Services total	3,675.7	4,382.7	5,612.4	7,122.1	8,948.9	11,057.4
Packaged software						
System infrastructure software	700.3	807.5	955.4	1,151.0	1,380.6	1,636.3
Appl. development and deployment	418.3	531.3	684.2	881.8	1,116.0	1,384.6
Applications	965.8	1,224.5	1,602.0	2,071.9	2,618.5	3,274.1
Packaged software total	2,084.4	2,563.3	3,241.6	4,104.7	5,115.1	6,294.9
Hardware						
Systems						
High-end enterprise servers	270.4	239.9	212.4	192.5	195.8	195.8
Midrange enterprise servers	588.6	624.0	701.8	769.5	791.8	825.7
Volume servers	995.2	1,128.8	1,376.1	1,650.1	1,939.2	2,290.2
Servers total	1,854.2	1,992.7	2,290.3	2,612.0	2,926.8	3,311.7
Personal computers	9,084.3	9,124.1	10,140.3	11,773.1	13,379.1	15,168.5
Traditional workstations	52.3	47.2	44.9	44.2	43.4	42.6
Clients total	9,136.6	9,171.3	10,185.2	11,817.3	13,422.5	15,211.0
Systems total	10,990.8	11,164.0	12,475.4	14,429.3	16,349.3	18,522.7
Storage						
Disk systems	635.1	696.4	759.2	824.0	866.6	901.1
Tape automation	72.3	83.1	88.6	94.9	100.5	105.8
Storage total	707.4	779.5	847.8	918.9	967.2	1,006.9
Peripherals						
Printers and MFPs	1,285.7	1,429.6	1,579.7	1,770.2	1,953.3	2,150.5
Smart handheld devices	481.6	655.2	945.8	1,189.2	1,405.4	1,538.2
Other add-ons	796.0	734.0	836.1	976.5	1,116.8	1,270.2
Peripherals total	2,563.3	2,818.8	3,361.5	3,935.9	4,475.5	4,958.9
Networking equipment	2,462.0	2,597.5	2,726.8	3,028.4	3,647.3	4,034.1
Hardware total	16,723.5	17,359.8	19,411.5	22,312.5	25,439.3	28,522.7
Packaged software total	2,084.4	2,563.3	3,241.6	4,104.7	5,115.1	6,294.9
Services total	3,675.7	4,382.7	5,612.4	7,122.1	8,948.9	11,057.4
Total IT	22,483.6	24,305.7	28,265.6	33,539.3	39,503.3	45,875.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 223

GROWTH IN IT SPENDING IN CHINA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	23.1	31.6	31.4	30.3	27.5	30.2
Implementation	21.8	28.1	27.4	26.6	24.1	26.5
Maintenance and support	13.0	21.9	21.7	20.7	19.1	20.8
Operations	46.4	52.3	47.5	43.8	38.7	45.5
IT training and education	12.6	30.7	23.8	19.1	18.0	22.8
Services total	19.2	28.1	26.9	25.7	23.6	26.0
Packaged software						
System infrastructure software	15.3	18.3	20.5	19.9	18.5	19.3
Appl. development and deployment	27.0	28.8	28.9	26.6	24.1	27.1
Applications	26.8	30.8	29.3	26.4	25.0	27.9
Packaged software total	23.0	26.5	26.6	24.6	23.1	25.2
Hardware						
Systems						
High-end enterprise servers	-11.3	-11.5	-9.4	1.7	0.0	-5.0
Midrange enterprise servers	6.0	12.5	9.6	2.9	4.3	7.3
Volume servers	13.4	21.9	19.9	17.5	18.1	19.3
Servers total	7.5	14.9	14.0	12.1	13.1	13.5
Personal computers	0.4	11.1	16.1	13.6	13.4	13.6
Traditional workstations	-9.8	-5.0	-1.5	-1.8	-1.8	-2.6
Clients total	0.4	11.1	16.1	13.6	13.4	13.6
Systems total	1.6	11.7	15.7	13.3	13.3	13.5
Storage						
Disk systems	9.7	9.0	8.5	5.2	4.0	6.7
Tape automation	15.0	6.6	7.1	5.9	5.3	6.2
Storage total	10.2	8.8	8.4	5.2	4.1	6.6
Peripherals						
Printers and MFPs	11.2	10.5	12.1	10.3	10.1	10.7
Smart handheld devices	36.1	44.3	25.7	18.2	9.4	23.8
Other add-ons	-7.8	13.9	16.8	14.4	13.7	14.7
Peripherals total	10.0	19.3	17.1	13.7	10.8	15.2
Networking equipment	5.5	5.0	11.1	20.4	10.6	11.6
Hardware total	3.8	11.8	14.9	14.0	12.1	13.2
Packaged software total	23.0	26.5	26.6	24.6	23.1	25.2
Services total	19.2	28.1	26.9	25.7	23.6	26.0
Total IT	8.1	16.3	18.7	17.8	16.1	17.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 224

PROPORTIONS OF IT SPENDING CATEGORIES IN CHINA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.9	2.1	2.4	2.7	3.0	3.3
Implementation	8.0	9.0	9.9	10.6	11.4	12.2
Maintenance and support	4.1	4.3	4.5	4.6	4.8	4.9
Operations	0.4	0.6	0.7	0.9	1.1	1.3
IT training and education	2.0	2.0	2.3	2.4	2.4	2.5
Services total	16.3	18.0	19.9	21.2	22.7	24.1
Packaged software						
System infrastructure software	3.1	3.3	3.4	3.4	3.5	3.6
Appl. development and deployment	1.9	2.2	2.4	2.6	2.8	3.0
Applications	4.3	5.0	5.7	6.2	6.6	7.1
Packaged software total	9.3	10.5	11.5	12.2	12.9	13.7
Hardware						
Systems						
High-end enterprise servers	1.2	1.0	0.8	0.6	0.5	0.4
Midrange enterprise servers	2.6	2.6	2.5	2.3	2.0	1.8
Volume servers	4.4	4.6	4.9	4.9	4.9	5.0
Servers total	8.2	8.2	8.1	7.8	7.4	7.2
Personal computers	40.4	37.5	35.9	35.1	33.9	33.1
Traditional workstations	0.2	0.2	0.2	0.1	0.1	0.1
Clients total	40.4	37.5	35.9	35.1	33.9	33.1
Systems total	48.9	45.9	44.1	43.0	41.4	40.4
Storage						
Disk systems	2.8	2.9	2.7	2.5	2.2	2.0
Tape automation	0.3	0.3	0.3	0.3	0.3	0.2
Storage total	3.1	3.2	3.0	2.7	2.4	2.2
Peripherals						
Printers and MFPs	5.7	5.9	5.6	5.3	4.9	4.7
Smart handheld devices	2.1	2.7	3.3	3.5	3.6	3.4
Other add-ons	3.5	3.0	3.0	2.9	2.8	2.8
Peripherals total	11.4	11.6	11.9	11.7	11.3	10.8
Networking equipment	11.0	10.7	9.6	9.0	9.2	8.8
Hardware total	74.4	71.4	68.7	66.5	64.4	62.2
Packaged software total	9.3	10.5	11.5	12.2	12.9	13.7
Services total	16.3	18.0	19.9	21.2	22.7	24.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 225

CHINA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	7.3	8.8	10.8	13.2	15.9	18.6
Implementation	8.5	10.0	12.0	14.1	16.4	18.6
Maintenance and support	7.1	7.9	9.2	10.6	12.0	13.3
Operations	0.8	1.2	1.7	2.3	3.0	3.8
IT training and education	14.7	16.1	19.5	22.2	24.2	26.1
Services total	6.8	7.9	9.5	11.2	13.0	14.7
Packaged software						
System infrastructure software	8.1	8.8	9.5	10.5	11.5	12.5
Appl. development and deployment	7.9	9.8	11.8	13.9	15.9	17.9
Applications	10.2	12.5	15.2	18.1	20.8	23.5
Packaged software total	8.9	10.5	12.3	14.2	16.1	18.1
Hardware						
Systems						
High-end enterprise servers	6.6	5.8	5.5	5.3	5.6	6.1
Midrange enterprise servers	12.9	16.2	16.8	18.1	18.6	18.5
Volume servers	20.8	22.7	25.3	27.8	29.8	31.9
Servers total	13.8	15.4	17.0	18.9	20.5	22.3
Personal computers	21.7	22.0	23.1	24.7	26.0	27.4
Traditional workstations	12.4	15.0	16.4	18.9	20.8	22.6
Clients total	21.6	21.9	23.0	24.7	25.9	27.4
Systems total	19.7	20.4	21.6	23.4	24.8	26.3
Storage						
Disk systems	11.9	13.7	14.4	15.0	15.2	15.4
Tape automation	9.6	10.7	10.9	11.1	11.3	11.4
Storage total	11.6	13.3	14.0	14.5	14.7	14.8
Peripherals						
Printers and MFPs	15.6	16.0	16.7	17.7	18.6	19.4
Smart handheld devices	31.1	35.1	38.6	38.5	36.5	32.0
Other add-ons	22.8	23.2	24.2	25.9	27.2	28.4
Peripherals total	19.3	20.2	21.9	23.3	24.3	24.4
Networking equipment	25.0	27.2	26.8	27.0	28.9	29.0
Hardware total	19.7	20.6	21.7	23.2	24.5	25.6
Packaged software total	8.9	10.5	12.3	14.2	16.1	18.1
Services total	6.8	7.9	9.5	11.2	13.0	14.7
Total IT	13.9	14.8	16.2	17.8	19.3	20.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 226

CHINA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.1	1.4	1.8	2.2	2.7	3.3
Implementation	1.3	1.6	2.0	2.4	2.9	3.3
Maintenance and support	1.0	1.1	1.3	1.5	1.6	1.8
Operations	0.1	0.2	0.3	0.4	0.5	0.6
IT training and education	2.0	2.3	3.0	3.6	4.0	4.5
Services total	1.0	1.2	1.5	1.8	2.1	2.4
Packaged software						
System infrastructure software	1.5	1.7	1.9	2.1	2.3	2.6
Appl. development and deployment	1.1	1.3	1.6	1.9	2.3	2.6
Applications	1.1	1.4	1.7	2.1	2.5	2.9
Packaged software total	1.2	1.5	1.7	2.1	2.4	2.7
Hardware						
Systems						
High-end enterprise servers	2.0	2.0	1.9	1.7	1.7	1.8
Midrange enterprise servers	4.0	4.6	5.0	5.2	5.4	5.3
Volume servers	4.7	5.1	5.7	6.4	6.9	7.8
Servers total	3.8	4.2	4.6	5.1	5.4	5.9
Personal computers	5.9	6.2	6.7	7.5	8.3	9.2
Traditional workstations	2.2	2.8	3.5	4.2	4.9	5.5
Clients total	5.8	6.2	6.7	7.5	8.3	9.2
Systems total	5.3	5.7	6.2	6.9	7.6	8.4
Storage						
Disk systems	2.9	3.3	3.6	3.7	3.8	3.8
Tape automation	2.5	2.8	2.9	3.0	3.0	3.0
Storage total	2.9	3.2	3.5	3.6	3.7	3.7
Peripherals						
Printers and MFPs	3.1	3.3	3.5	3.8	4.0	4.3
Smart handheld devices	6.4	6.0	5.7	5.1	4.8	4.3
Other add-ons	6.3	6.3	7.1	8.1	8.8	9.7
Peripherals total	4.2	4.3	4.6	4.8	4.9	5.0
Networking equipment	4.9	5.3	5.2	5.4	5.9	6.0
Hardware total	4.9	5.2	5.5	6.0	6.5	6.9
Packaged software total	1.2	1.5	1.7	2.1	2.4	2.7
Services total	1.0	1.2	1.5	1.8	2.1	2.4
Total IT	2.6	2.8	3.1	3.5	3.8	4.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 227

IT SPENDING IN HONG KONG, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	58.8	56.7	57.0	57.5	58.0	58.6
Implementation	243.0	233.8	234.9	236.3	237.7	239.6
Maintenance and support	154.4	149.7	150.3	150.8	151.3	152.0
Operations	126.1	122.9	124.1	125.1	125.9	127.0
IT training and education	70.3	68.1	68.7	69.0	69.5	70.9
Services total	652.6	631.3	635.0	638.8	642.5	648.0
Packaged software						
System infrastructure software	122.2	120.7	128.2	137.1	149.0	163.2
Appl. development and deployment	103.5	104.0	107.6	113.7	122.2	130.4
Applications	97.8	93.1	97.0	102.9	110.9	121.5
Packaged software total	323.5	317.7	332.8	353.7	382.1	415.0
Hardware						
Systems						
High-end enterprise servers	40.1	35.0	32.1	30.2	31.1	33.4
Midrange enterprise servers	88.1	88.6	100.5	108.5	106.3	102.4
Volume servers	122.0	117.5	123.0	129.9	145.4	162.7
Servers total	250.2	241.0	255.6	268.6	282.8	298.5
Personal computers	738.0	665.7	673.5	710.4	740.4	760.8
Traditional workstations	2.5	2.4	2.3	2.1	2.0	1.8
Clients total	740.5	668.2	675.8	712.5	742.3	762.6
Systems total	990.7	909.2	931.4	981.1	1,025.2	1,061.1
Storage						
Disk systems	95.9	91.1	90.5	92.9	94.3	92.7
Tape automation	14.1	14.6	15.0	15.4	15.8	16.2
Storage total	110.0	105.7	105.4	108.3	110.1	108.9
Peripherals						
Printers and MFPs	104.9	97.3	95.7	95.8	95.9	94.8
Smart handheld devices	55.0	83.7	120.7	160.2	192.4	216.2
Other add-ons	77.1	69.8	76.0	84.1	92.0	99.4
Peripherals total	237.0	250.7	292.5	340.2	380.2	410.4
Networking equipment	260.9	259.4	289.2	307.7	329.2	345.4
Hardware total	1,598.6	1,525.1	1,618.5	1,737.3	1,844.6	1,925.7
Packaged software total	323.5	317.7	332.8	353.7	382.1	415.0
Services total	652.6	631.3	635.0	638.8	642.5	648.0
Total IT	2,574.6	2,474.1	2,586.3	2,729.8	2,869.2	2,988.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 228

GROWTH IN IT SPENDING IN HONG KONG, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-3.6	0.6	0.8	0.8	1.0	0.8
Implementation	-3.8	0.5	0.6	0.6	0.8	0.6
Maintenance and support	-3.0	0.4	0.4	0.3	0.4	0.4
Operations	-2.5	0.9	0.8	0.7	0.9	0.8
IT training and education	-3.0	0.8	0.5	0.7	1.9	1.0
Services total	-3.3	0.6	0.6	0.6	0.9	0.7
Packaged software						
System infrastructure software	-1.2	6.2	7.0	8.6	9.6	7.8
Appl. development and deployment	0.5	3.5	5.6	7.5	6.7	5.8
Applications	-4.8	4.2	6.1	7.8	9.5	6.9
Packaged software total	-1.8	4.7	6.3	8.0	8.6	6.9
Hardware						
Systems						
High-end enterprise servers	-12.8	-8.3	-5.8	2.8	7.2	-1.2
Midrange enterprise servers	0.5	13.5	7.9	-2.0	-3.7	3.7
Volume servers	-3.7	4.7	5.6	12.0	11.9	8.5
Servers total	-3.7	6.0	5.1	5.3	5.5	5.5
Personal computers	-9.8	1.2	5.5	4.2	2.8	3.4
Traditional workstations	-2.6	-5.7	-7.0	-7.7	-7.7	-7.0
Clients total	-9.8	1.2	5.5	4.2	2.8	3.4
Systems total	-8.2	2.4	5.3	4.5	3.5	3.9
Storage						
Disk systems	-5.0	-0.7	2.7	1.4	-1.6	0.4
Tape automation	4.1	2.2	3.0	2.8	2.0	2.5
Storage total	-3.8	-0.3	2.8	1.6	-1.1	0.7
Peripherals						
Printers and MFPs	-7.2	-1.6	0.1	0.0	-1.1	-0.6
Smart handheld devices	52.2	44.3	32.7	20.1	12.4	26.8
Other add-ons	-9.5	9.0	10.6	9.3	8.1	9.2
Peripherals total	5.8	16.7	16.3	11.8	7.9	13.1
Networking equipment	-0.6	11.5	6.4	7.0	4.9	7.4
Hardware total	-4.6	6.1	7.3	6.2	4.4	6.0
Packaged software total	-1.8	4.7	6.3	8.0	8.6	6.9
Services total	-3.3	0.6	0.6	0.6	0.9	0.7
Total IT	-3.9	4.5	5.5	5.1	4.2	4.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 229

PROPORTIONS OF IT SPENDING CATEGORIES IN HONG KONG, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.3	2.2	2.1	2.0	2.0
Implementation	9.4	9.4	9.1	8.7	8.3	8.0
Maintenance and support	6.0	6.1	5.8	5.5	5.3	5.1
Operations	4.9	5.0	4.8	4.6	4.4	4.2
IT training and education	2.7	2.8	2.7	2.5	2.4	2.4
Services total	25.3	25.5	24.6	23.4	22.4	21.7
Packaged software						
System infrastructure software	4.7	4.9	5.0	5.0	5.2	5.5
Appl. development and deployment	4.0	4.2	4.2	4.2	4.3	4.4
Applications	3.8	3.8	3.7	3.8	3.9	4.1
Packaged software total	12.6	12.8	12.9	13.0	13.3	13.9
Hardware						
Systems						
High-end enterprise servers	1.6	1.4	1.2	1.1	1.1	1.1
Midrange enterprise servers	3.4	3.6	3.9	4.0	3.7	3.4
Volume servers	4.7	4.7	4.8	4.8	5.1	5.4
Servers total	9.7	9.7	9.9	9.8	9.9	10.0
Personal computers	28.7	26.9	26.0	26.0	25.8	25.5
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	28.7	26.9	26.0	26.0	25.8	25.5
Systems total	38.5	36.7	36.0	35.9	35.7	35.5
Storage						
Disk systems	3.7	3.7	3.5	3.4	3.3	3.1
Tape automation	0.5	0.6	0.6	0.6	0.6	0.5
Storage total	4.3	4.3	4.1	4.0	3.8	3.6
Peripherals						
Printers and MFPs	4.1	3.9	3.7	3.5	3.3	3.2
Smart handheld devices	2.1	3.4	4.7	5.9	6.7	7.2
Other add-ons	3.0	2.8	2.9	3.1	3.2	3.3
Peripherals total	9.2	10.1	11.3	12.5	13.3	13.7
Networking equipment	10.1	10.5	11.2	11.3	11.5	11.6
Hardware total	62.1	61.6	62.6	63.6	64.3	64.4
Packaged software total	12.6	12.8	12.9	13.0	13.3	13.9
Services total	25.3	25.5	24.6	23.4	22.4	21.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 230

HONG KONG PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.0	1.0	0.9	0.8	0.8	0.7
Implementation	1.2	1.1	1.0	0.9	0.9	0.8
Maintenance and support	1.2	1.1	1.1	1.0	1.0	0.9
Operations	1.2	1.1	1.0	0.9	0.9	0.8
IT training and education	2.3	2.2	2.1	1.9	1.8	1.6
Services total	1.2	1.1	1.1	1.0	0.9	0.9
Packaged software						
System infrastructure software	1.4	1.3	1.3	1.2	1.2	1.2
Appl. development and deployment	1.9	1.9	1.9	1.8	1.7	1.7
Applications	1.0	1.0	0.9	0.9	0.9	0.9
Packaged software total	1.4	1.3	1.3	1.2	1.2	1.2
Hardware						
Systems						
High-end enterprise servers	1.0	0.9	0.8	0.8	0.9	1.0
Midrange enterprise servers	1.9	2.3	2.4	2.5	2.5	2.3
Volume servers	2.6	2.4	2.3	2.2	2.2	2.3
Servers total	1.9	1.9	1.9	1.9	2.0	2.0
Personal computers	1.8	1.6	1.5	1.5	1.4	1.4
Traditional workstations	0.6	0.8	0.8	0.9	1.0	1.0
Clients total	1.8	1.6	1.5	1.5	1.4	1.4
Systems total	1.8	1.7	1.6	1.6	1.6	1.5
Storage						
Disk systems	1.8	1.8	1.7	1.7	1.7	1.6
Tape automation	1.9	1.9	1.8	1.8	1.8	1.7
Storage total	1.8	1.8	1.7	1.7	1.7	1.6
Peripherals						
Printers and MFPs	1.3	1.1	1.0	1.0	0.9	0.9
Smart handheld devices	3.5	4.5	4.9	5.2	5.0	4.5
Other add-ons	2.2	2.2	2.2	2.2	2.2	2.2
Peripherals total	1.8	1.8	1.9	2.0	2.1	2.0
Networking equipment	2.7	2.7	2.8	2.7	2.6	2.5
Hardware total	1.9	1.8	1.8	1.8	1.8	1.7
Packaged software total	1.4	1.3	1.3	1.2	1.2	1.2
Services total	1.2	1.1	1.1	1.0	0.9	0.9
Total IT	1.6	1.5	1.5	1.4	1.4	1.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 231

HONG KONG PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.1	0.1	0.1	0.1
Implementation	0.2	0.2	0.2	0.2	0.2	0.1
Maintenance and support	0.2	0.2	0.2	0.1	0.1	0.1
Operations	0.2	0.2	0.2	0.2	0.1	0.1
IT training and education	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.2	0.2	0.2	0.2	0.2	0.1
Packaged software						
System infrastructure software	0.3	0.3	0.3	0.3	0.3	0.3
Appl. development and deployment	0.3	0.3	0.3	0.3	0.2	0.2
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.3	0.3	0.3	0.3
Midrange enterprise servers	0.6	0.7	0.7	0.7	0.7	0.7
Volume servers	0.6	0.5	0.5	0.5	0.5	0.6
Servers total	0.5	0.5	0.5	0.5	0.5	0.5
Personal computers	0.5	0.5	0.4	0.5	0.5	0.5
Traditional workstations	0.1	0.1	0.2	0.2	0.2	0.2
Clients total	0.5	0.4	0.4	0.5	0.5	0.5
Systems total	0.5	0.5	0.5	0.5	0.5	0.5
Storage						
Disk systems	0.4	0.4	0.4	0.4	0.4	0.4
Tape automation	0.5	0.5	0.5	0.5	0.5	0.5
Storage total	0.4	0.4	0.4	0.4	0.4	0.4
Peripherals						
Printers and MFPs	0.3	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.7	0.8	0.7	0.7	0.7	0.6
Other add-ons	0.6	0.6	0.6	0.7	0.7	0.8
Peripherals total	0.4	0.4	0.4	0.4	0.4	0.4
Networking equipment	0.5	0.5	0.6	0.5	0.5	0.5
Hardware total	0.5	0.5	0.5	0.5	0.5	0.5
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.1
Total IT	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 232

IT SPENDING IN INDIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	128.0	143.7	165.5	187.8	213.4	238.0
Implementation	646.4	724.2	832.7	941.2	1,060.2	1,173.0
Maintenance and support	326.7	372.1	427.3	487.2	551.9	619.0
Operations	134.0	160.5	192.2	228.1	263.9	298.0
IT training and education	52.2	57.0	63.2	69.4	75.3	81.2
Services total	1,287.4	1,457.5	1,680.9	1,913.8	2,164.8	2,409.2
Packaged software						
System infrastructure software	136.0	150.7	181.4	220.2	274.8	346.6
Appl. development and deployment	90.2	97.0	112.6	129.1	152.5	176.2
Applications	230.5	281.7	343.1	417.4	511.0	608.6
Packaged software total	456.8	529.5	637.1	766.7	938.3	1,131.4
Hardware						
Systems						
High-end enterprise servers	30.0	35.9	36.7	36.7	38.4	44.2
Midrange enterprise servers	115.3	124.9	146.6	162.2	178.3	193.3
Volume servers	147.6	169.2	171.9	188.4	224.7	264.6
Servers total	292.9	329.9	355.1	387.3	441.4	502.1
Personal computers	1,737.5	1,998.3	2,489.8	3,262.6	4,347.2	5,281.3
Traditional workstations	20.3	16.4	15.2	13.3	11.8	10.4
Clients total	1,757.8	2,014.7	2,505.0	3,275.8	4,359.0	5,291.6
Systems total	2,050.7	2,344.6	2,860.1	3,663.1	4,800.4	5,793.8
Storage						
Disk systems	103.1	117.4	130.0	149.1	174.9	198.9
Tape automation	16.5	18.8	20.2	21.2	22.4	23.8
Storage total	119.6	136.2	150.1	170.3	197.3	222.7
Peripherals						
Printers and MFPs	222.2	245.7	273.3	319.4	371.4	413.5
Smart handheld devices	5.2	20.3	28.3	29.3	38.7	42.5
Other add-ons	149.8	156.8	198.4	257.3	336.0	406.3
Peripherals total	377.1	422.8	500.0	606.0	746.1	862.4
Networking equipment	344.5	402.9	493.2	630.8	831.0	1,052.9
Hardware total	2,891.9	3,306.6	4,003.4	5,070.2	6,574.7	7,931.7
Packaged software total	456.8	529.5	637.1	766.7	938.3	1,131.4
Services total	1,287.4	1,457.5	1,680.9	1,913.8	2,164.8	2,409.2
Total IT	4,636.0	5,293.6	6,321.4	7,750.7	9,677.8	11,472.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 233

GROWTH IN IT SPENDING IN INDIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	12.3	15.2	13.5	13.6	11.5	13.4
Implementation	12.0	15.0	13.0	12.6	10.6	12.8
Maintenance and support	13.9	14.8	14.0	13.3	12.2	13.6
Operations	19.7	19.8	18.7	15.7	12.9	16.7
IT training and education	9.1	10.8	9.9	8.5	7.7	9.2
Services total	13.2	15.3	13.9	13.1	11.3	13.4
Packaged software						
System infrastructure software	10.8	20.3	21.4	24.8	26.1	23.1
Appl. development and deployment	7.6	16.0	14.6	18.2	15.5	16.1
Applications	22.2	21.8	21.7	22.4	19.1	21.2
Packaged software total	15.9	20.3	20.3	22.4	20.6	20.9
Hardware						
Systems						
High-end enterprise servers	19.9	2.1	0.2	4.6	15.1	5.4
Midrange enterprise servers	8.3	17.4	10.6	10.0	8.4	11.5
Volume servers	14.6	1.6	9.6	19.2	17.8	11.8
Servers total	12.7	7.6	9.1	14.0	13.8	11.1
Personal computers	15.0	24.6	31.0	33.2	21.5	27.5
Traditional workstations	-19.2	-7.5	-12.6	-10.8	-12.2	-10.8
Clients total	15.0	24.6	31.0	33.2	21.5	27.5
Systems total	14.3	22.0	28.1	31.0	20.7	25.4
Storage						
Disk systems	13.8	10.7	14.7	17.3	13.7	14.1
Tape automation	14.3	7.2	5.1	5.6	6.3	6.0
Storage total	13.9	10.2	13.4	15.9	12.9	13.1
Peripherals						
Printers and MFPs	10.6	11.2	16.9	16.3	11.4	13.9
Smart handheld devices	290.1	38.9	3.9	32.0	9.8	20.2
Other add-ons	4.7	26.5	29.7	30.6	20.9	26.9
Peripherals total	12.1	18.2	21.2	23.1	15.6	19.5
Networking equipment	17.0	22.4	27.9	31.7	26.7	27.1
Hardware total	14.3	21.1	26.6	29.7	20.6	24.5
Packaged software total	15.9	20.3	20.3	22.4	20.6	20.9
Services total	13.2	15.3	13.9	13.1	11.3	13.4
Total IT	14.2	19.4	22.6	24.9	18.5	21.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 234

PROPORTIONS OF IT SPENDING CATEGORIES IN INDIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.8	2.7	2.6	2.4	2.2	2.1
Implementation	13.9	13.7	13.2	12.1	11.0	10.2
Maintenance and support	7.0	7.0	6.8	6.3	5.7	5.4
Operations	2.9	3.0	3.0	2.9	2.7	2.6
IT training and education	1.1	1.1	1.0	0.9	0.8	0.7
Services total	27.8	27.5	26.6	24.7	22.4	21.0
Packaged software						
System infrastructure software	2.9	2.8	2.9	2.8	2.8	3.0
Appl. development and deployment	1.9	1.8	1.8	1.7	1.6	1.5
Applications	5.0	5.3	5.4	5.4	5.3	5.3
Packaged software total	9.9	10.0	10.1	9.9	9.7	9.9
Hardware						
Systems						
High-end enterprise servers	0.6	0.7	0.6	0.5	0.4	0.4
Midrange enterprise servers	2.5	2.4	2.3	2.1	1.8	1.7
Volume servers	3.2	3.2	2.7	2.4	2.3	2.3
Servers total	6.3	6.2	5.6	5.0	4.6	4.4
Personal computers	37.5	37.7	39.4	42.1	44.9	46.0
Traditional workstations	0.4	0.3	0.2	0.2	0.1	0.1
Clients total	37.5	37.7	39.4	42.1	44.9	46.0
Systems total	44.2	44.3	45.2	47.3	49.6	50.5
Storage						
Disk systems	2.2	2.2	2.1	1.9	1.8	1.7
Tape automation	0.4	0.4	0.3	0.3	0.2	0.2
Storage total	2.6	2.6	2.4	2.2	2.0	1.9
Peripherals						
Printers and MFPs	4.8	4.6	4.3	4.1	3.8	3.6
Smart handheld devices	0.1	0.4	0.4	0.4	0.4	0.4
Other add-ons	3.2	3.0	3.1	3.3	3.5	3.5
Peripherals total	8.1	8.0	7.9	7.8	7.7	7.5
Networking equipment	7.4	7.6	7.8	8.1	8.6	9.2
Hardware total	62.4	62.5	63.3	65.4	67.9	69.1
Packaged software total	9.9	10.0	10.1	9.9	9.7	9.9
Services total	27.8	27.5	26.6	24.7	22.4	21.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 235

INDIA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.4	2.6	2.8	2.9	3.0
Implementation	3.1	3.3	3.6	3.7	3.9	3.9
Maintenance and support	2.5	2.8	3.1	3.3	3.5	3.7
Operations	1.2	1.4	1.6	1.7	1.8	1.9
IT training and education	1.7	1.8	1.9	1.9	1.9	1.9
Services total	2.4	2.6	2.8	3.0	3.1	3.2
Packaged software						
System infrastructure software	1.6	1.6	1.8	2.0	2.3	2.6
Appl. development and deployment	1.7	1.8	1.9	2.0	2.2	2.3
Applications	2.4	2.9	3.3	3.6	4.1	4.4
Packaged software total	1.9	2.2	2.4	2.7	3.0	3.3
Hardware						
Systems						
High-end enterprise servers	0.7	0.9	0.9	1.0	1.1	1.4
Midrange enterprise servers	2.5	3.2	3.5	3.8	4.2	4.3
Volume servers	3.1	3.4	3.2	3.2	3.4	3.7
Servers total	2.2	2.6	2.6	2.8	3.1	3.4
Personal computers	4.2	4.8	5.7	6.9	8.4	9.5
Traditional workstations	4.8	5.2	5.6	5.7	5.7	5.5
Clients total	4.2	4.8	5.7	6.8	8.4	9.5
Systems total	3.7	4.3	5.0	5.9	7.3	8.2
Storage						
Disk systems	1.9	2.3	2.5	2.7	3.1	3.4
Tape automation	2.2	2.4	2.5	2.5	2.5	2.6
Storage total	2.0	2.3	2.5	2.7	3.0	3.3
Peripherals						
Printers and MFPs	2.7	2.7	2.9	3.2	3.5	3.7
Smart handheld devices	0.3	1.1	1.2	0.9	1.0	0.9
Other add-ons	4.3	5.0	5.8	6.8	8.2	9.1
Peripherals total	2.8	3.0	3.3	3.6	4.0	4.2
Networking equipment	3.5	4.2	4.8	5.6	6.6	7.6
Hardware total	3.4	3.9	4.5	5.3	6.3	7.1
Packaged software total	1.9	2.2	2.4	2.7	3.0	3.3
Services total	2.4	2.6	2.8	3.0	3.1	3.2
Total IT	2.9	3.2	3.6	4.1	4.7	5.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 236

INDIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.3	0.4	0.4	0.5	0.5	0.5
Implementation	0.5	0.5	0.6	0.6	0.7	0.7
Maintenance and support	0.4	0.4	0.4	0.5	0.5	0.5
Operations	0.2	0.2	0.3	0.3	0.3	0.3
IT training and education	0.2	0.3	0.3	0.3	0.3	0.3
Services total	0.4	0.4	0.5	0.5	0.5	0.5
Packaged software						
System infrastructure software	0.3	0.3	0.4	0.4	0.5	0.5
Appl. development and deployment	0.2	0.2	0.3	0.3	0.3	0.3
Applications	0.3	0.3	0.4	0.4	0.5	0.5
Packaged software total	0.3	0.3	0.3	0.4	0.4	0.5
Hardware						
Systems						
High-end enterprise servers	0.2	0.3	0.3	0.3	0.3	0.4
Midrange enterprise servers	0.8	0.9	1.0	1.1	1.2	1.2
Volume servers	0.7	0.8	0.7	0.7	0.8	0.9
Servers total	0.6	0.7	0.7	0.7	0.8	0.9
Personal computers	1.1	1.4	1.7	2.1	2.7	3.2
Traditional workstations	0.9	1.0	1.2	1.3	1.3	1.3
Clients total	1.1	1.4	1.7	2.1	2.7	3.2
Systems total	1.0	1.2	1.4	1.7	2.2	2.6
Storage						
Disk systems	0.5	0.6	0.6	0.7	0.8	0.8
Tape automation	0.6	0.6	0.7	0.7	0.7	0.7
Storage total	0.5	0.6	0.6	0.7	0.7	0.8
Peripherals						
Printers and MFPs	0.5	0.6	0.6	0.7	0.8	0.8
Smart handheld devices	0.1	0.2	0.2	0.1	0.1	0.1
Other add-ons	1.2	1.4	1.7	2.1	2.6	3.1
Peripherals total	0.6	0.6	0.7	0.7	0.8	0.9
Networking equipment	0.7	0.8	0.9	1.1	1.3	1.6
Hardware total	0.8	1.0	1.1	1.4	1.7	1.9
Packaged software total	0.3	0.3	0.3	0.4	0.4	0.5
Services total	0.4	0.4	0.5	0.5	0.5	0.5
Total IT	0.5	0.6	0.7	0.8	0.9	1.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 237

IT SPENDING IN INDONESIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	19.3	21.4	23.8	27.4	31.6	36.7
Implementation	68.1	75.1	83.3	95.0	109.0	126.2
Maintenance and support	47.2	51.8	57.4	64.5	73.6	84.8
Operations	18.5	20.7	23.8	27.4	32.9	39.9
IT training and education	18.5	20.8	23.4	26.7	30.6	35.4
Services total	171.6	189.8	211.7	240.9	277.6	323.0
Packaged software						
System infrastructure software	38.0	38.3	45.5	51.1	57.2	62.9
Appl. development and deployment	18.6	18.3	19.4	20.5	22.3	24.0
Applications	43.9	45.2	47.9	52.0	56.9	60.9
Packaged software total	100.5	101.7	112.8	123.6	136.4	147.8
Hardware						
Systems						
High-end enterprise servers	35.0	37.4	34.6	36.0	36.9	35.8
Midrange enterprise servers	25.9	25.9	32.9	36.5	41.2	46.8
Volume servers	63.5	72.2	78.9	91.0	106.5	126.3
Servers total	124.4	135.4	146.3	163.4	184.6	208.9
Personal computers	504.0	529.8	545.5	580.8	628.7	672.6
Traditional workstations	2.0	2.1	1.9	1.7	1.6	1.4
Clients total	505.9	531.9	547.4	582.5	630.3	674.0
Systems total	630.4	667.4	693.7	746.0	814.9	883.0
Storage						
Disk systems	34.6	38.8	41.4	43.7	45.9	47.7
Tape automation	6.2	4.7	4.9	5.1	5.4	5.8
Storage total	40.8	43.5	46.2	48.9	51.4	53.6
Peripherals						
Printers and MFPs	102.9	100.3	108.1	122.3	127.8	130.9
Smart handheld devices	4.1	4.9	5.7	6.6	7.8	10.5
Other add-ons	47.9	46.8	50.1	54.8	60.8	66.5
Peripherals total	154.9	152.0	163.8	183.7	196.3	207.9
Networking equipment	68.5	68.3	76.0	87.9	102.3	114.0
Hardware total	894.6	931.1	979.7	1,066.5	1,164.9	1,258.4
Packaged software total	100.5	101.7	112.8	123.6	136.4	147.8
Services total	171.6	189.8	211.7	240.9	277.6	323.0
Total IT	1,166.7	1,222.6	1,304.3	1,431.0	1,578.9	1,729.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 238

GROWTH IN IT SPENDING IN INDONESIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	10.5	11.5	14.8	15.3	16.3	14.5
Implementation	10.3	11.0	14.0	14.8	15.8	13.9
Maintenance and support	9.9	10.7	12.3	14.1	15.2	13.1
Operations	12.1	14.6	15.5	19.9	21.3	17.8
IT training and education	12.3	12.9	13.8	14.7	15.7	14.3
Services total	10.6	11.6	13.8	15.2	16.3	14.2
Packaged software						
System infrastructure software	0.9	18.9	12.2	12.0	9.9	13.2
Appl. development and deployment	-2.0	6.1	5.6	9.0	7.5	7.0
Applications	3.0	6.1	8.7	9.3	7.1	7.8
Packaged software total	1.2	10.9	9.6	10.4	8.3	9.8
Hardware						
Systems						
High-end enterprise servers	6.8	-7.5	4.0	2.6	-2.9	-1.1
Midrange enterprise servers	-0.1	27.1	10.9	12.8	13.6	15.9
Volume servers	13.6	9.2	15.3	17.1	18.6	15.0
Servers total	8.9	8.1	11.7	13.0	13.2	11.4
Personal computers	5.1	3.0	6.5	8.2	7.0	6.1
Traditional workstations	5.7	-9.2	-8.6	-8.1	-8.9	-8.7
Clients total	5.1	3.0	6.5	8.2	7.0	6.1
Systems total	5.9	4.0	7.5	9.2	8.4	7.2
Storage						
Disk systems	12.2	6.6	5.8	4.9	4.0	5.3
Tape automation	-25.0	4.4	5.6	6.1	7.1	5.8
Storage total	6.5	6.4	5.7	5.1	4.3	5.4
Peripherals						
Printers and MFPs	-2.6	7.8	13.2	4.5	2.4	6.9
Smart handheld devices	18.7	17.1	16.4	17.2	35.6	21.3
Other add-ons	-2.2	6.9	9.4	11.0	9.4	9.1
Peripherals total	-1.9	7.8	12.1	6.9	5.9	8.1
Networking equipment	-0.3	11.3	15.7	16.3	11.5	13.7
Hardware total	4.1	5.2	8.9	9.2	8.0	7.8
Packaged software total	1.2	10.9	9.6	10.4	8.3	9.8
Services total	10.6	11.6	13.8	15.2	16.3	14.2
Total IT	4.8	6.7	9.7	10.3	9.5	9.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 239

PROPORTIONS OF IT SPENDING CATEGORIES IN INDONESIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.7	1.7	1.8	1.9	2.0	2.1
Implementation	5.8	6.1	6.4	6.6	6.9	7.3
Maintenance and support	4.0	4.2	4.4	4.5	4.7	4.9
Operations	1.6	1.7	1.8	1.9	2.1	2.3
IT training and education	1.6	1.7	1.8	1.9	1.9	2.0
Services total	14.7	15.5	16.2	16.8	17.6	18.7
Packaged software						
System infrastructure software	3.3	3.1	3.5	3.6	3.6	3.6
Appl. development and deployment	1.6	1.5	1.5	1.4	1.4	1.4
Applications	3.8	3.7	3.7	3.6	3.6	3.5
Packaged software total	8.6	8.3	8.6	8.6	8.6	8.5
Hardware						
Systems						
High-end enterprise servers	3.0	3.1	2.6	2.5	2.3	2.1
Midrange enterprise servers	2.2	2.1	2.5	2.6	2.6	2.7
Volume servers	5.4	5.9	6.0	6.4	6.7	7.3
Servers total	10.7	11.1	11.2	11.4	11.7	12.1
Personal computers	43.2	43.3	41.8	40.6	39.8	38.9
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	43.2	43.3	41.8	40.6	39.8	38.9
Systems total	54.0	54.6	53.2	52.1	51.6	51.1
Storage						
Disk systems	3.0	3.2	3.2	3.1	2.9	2.8
Tape automation	0.5	0.4	0.4	0.4	0.3	0.3
Storage total	3.5	3.6	3.5	3.4	3.3	3.1
Peripherals						
Printers and MFPs	8.8	8.2	8.3	8.5	8.1	7.6
Smart handheld devices	0.4	0.4	0.4	0.5	0.5	0.6
Other add-ons	4.1	3.8	3.8	3.8	3.9	3.8
Peripherals total	13.3	12.4	12.6	12.8	12.4	12.0
Networking equipment	5.9	5.6	5.8	6.1	6.5	6.6
Hardware total	76.7	76.2	75.1	74.5	73.8	72.8
Packaged software total	8.6	8.3	8.6	8.6	8.6	8.5
Services total	14.7	15.5	16.2	16.8	17.6	18.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 240

INDONESIA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.3	0.4	0.4	0.4	0.4	0.5
Implementation	0.3	0.3	0.4	0.4	0.4	0.4
Maintenance and support	0.4	0.4	0.4	0.4	0.5	0.5
Operations	0.2	0.2	0.2	0.2	0.2	0.2
IT training and education	0.6	0.7	0.7	0.7	0.8	0.8
Services total	0.3	0.3	0.4	0.4	0.4	0.4
Packaged software						
System infrastructure software	0.4	0.4	0.5	0.5	0.5	0.5
Appl. development and deployment	0.4	0.3	0.3	0.3	0.3	0.3
Applications	0.5	0.5	0.5	0.5	0.5	0.4
Packaged software total	0.4	0.4	0.4	0.4	0.4	0.4
Hardware						
Systems						
High-end enterprise servers	0.9	0.9	0.9	1.0	1.0	1.1
Midrange enterprise servers	0.6	0.7	0.8	0.9	1.0	1.0
Volume servers	1.3	1.5	1.5	1.5	1.6	1.8
Servers total	0.9	1.0	1.1	1.2	1.3	1.4
Personal computers	1.2	1.3	1.2	1.2	1.2	1.2
Traditional workstations	0.5	0.7	0.7	0.7	0.8	0.8
Clients total	1.2	1.3	1.2	1.2	1.2	1.2
Systems total	1.1	1.2	1.2	1.2	1.2	1.3
Storage						
Disk systems	0.6	0.8	0.8	0.8	0.8	0.8
Tape automation	0.8	0.6	0.6	0.6	0.6	0.6
Storage total	0.7	0.7	0.8	0.8	0.8	0.8
Peripherals						
Printers and MFPs	1.2	1.1	1.1	1.2	1.2	1.2
Smart handheld devices	0.3	0.3	0.2	0.2	0.2	0.2
Other add-ons	1.4	1.5	1.5	1.5	1.5	1.5
Peripherals total	1.2	1.1	1.1	1.1	1.1	1.0
Networking equipment	0.7	0.7	0.7	0.8	0.8	0.8
Hardware total	1.1	1.1	1.1	1.1	1.1	1.1
Packaged software total	0.4	0.4	0.4	0.4	0.4	0.4
Services total	0.3	0.3	0.4	0.4	0.4	0.4
Total IT	0.7	0.7	0.7	0.8	0.8	0.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 241

INDONESIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.0	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.0	0.0	0.0	0.0	0.0	0.0
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.3	0.3	0.3	0.3
Midrange enterprise servers	0.2	0.2	0.2	0.2	0.3	0.3
Volume servers	0.3	0.3	0.3	0.4	0.4	0.4
Servers total	0.3	0.3	0.3	0.3	0.3	0.4
Personal computers	0.3	0.4	0.4	0.4	0.4	0.4
Traditional workstations	0.1	0.1	0.1	0.2	0.2	0.2
Clients total	0.3	0.4	0.4	0.4	0.4	0.4
Systems total	0.3	0.3	0.3	0.4	0.4	0.4
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.3	0.2	0.2	0.3	0.3	0.3
Smart handheld devices	0.1	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.4	0.4	0.4	0.5	0.5	0.5
Peripherals total	0.3	0.2	0.2	0.2	0.2	0.2
Networking equipment	0.1	0.1	0.1	0.2	0.2	0.2
Hardware total	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.0	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 242

IT SPENDING IN JAPAN, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3,950.5	3,931.3	4,048.2	4,174.5	4,319.5	4,495.4
Implementation	13,427.6	13,408.1	13,889.0	14,399.9	14,990.9	15,684.7
Maintenance and support	9,090.0	9,018.9	9,093.4	9,303.2	9,693.5	10,166.0
Operations	6,656.3	6,928.8	7,244.1	7,656.2	8,157.8	8,753.2
IT training and education	1,645.6	1,618.8	1,625.2	1,674.5	1,736.8	1,821.3
Services total	34,770.0	34,905.9	35,899.9	37,208.3	38,898.5	40,920.7
Packaged software						
System infrastructure software	5,799.7	6,145.0	6,660.2	7,166.7	7,706.3	8,207.8
Appl. development and deployment	3,177.6	3,204.2	3,314.8	3,515.8	3,768.9	4,034.2
Applications	5,538.6	5,628.6	5,767.8	5,953.4	6,192.7	6,465.0
Packaged software total	14,515.8	14,977.8	15,742.7	16,636.0	17,667.8	18,707.1
Hardware						
Systems						
High-end enterprise servers	2,956.0	3,094.1	2,895.6	2,677.5	2,557.3	2,224.6
Midrange enterprise servers	2,525.6	1,801.8	1,860.0	1,722.9	1,615.2	1,725.7
Volume servers	1,965.5	1,951.1	2,032.4	2,086.6	2,130.7	2,183.1
Servers total	7,447.1	6,847.1	6,788.0	6,487.0	6,303.2	6,133.4
Personal computers	18,820.0	18,033.8	18,469.2	18,940.7	19,360.4	19,545.3
Traditional workstations	238.4	159.3	121.1	99.3	85.4	75.7
Clients total	19,058.4	18,193.1	18,590.3	19,040.0	19,445.8	19,621.0
Systems total	26,505.5	25,040.2	25,378.4	25,527.0	25,749.0	25,754.4
Storage						
Disk systems	2,940.0	2,786.5	2,825.8	2,879.5	2,945.0	3,017.8
Tape automation	456.4	463.2	486.4	513.2	536.3	558.8
Storage total	3,396.4	3,249.7	3,312.2	3,392.6	3,481.2	3,576.6
Peripherals						
Printers and MFPs	4,792.6	5,341.8	5,607.5	5,911.1	6,148.2	6,494.2
Smart handheld devices	619.4	578.1	634.4	718.2	816.9	924.8
Other add-ons	1,256.0	1,054.5	1,080.7	1,077.2	1,045.7	1,056.0
Peripherals total	6,667.9	6,974.4	7,322.6	7,706.4	8,010.9	8,475.1
Networking equipment	3,944.6	3,608.9	3,779.6	4,070.7	4,220.6	4,530.8
Hardware total	40,514.3	38,873.2	39,792.8	40,696.8	41,461.6	42,336.9
Packaged software total	14,515.8	14,977.8	15,742.7	16,636.0	17,667.8	18,707.1
Services total	34,770.0	34,905.9	35,899.9	37,208.3	38,898.5	40,920.7
Total IT	89,800.1	88,756.9	91,435.5	94,541.0	98,028.0	101,964.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 243

GROWTH IN IT SPENDING IN JAPAN, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-0.5	3.0	3.1	3.5	4.1	3.4
Implementation	-0.1	3.6	3.7	4.1	4.6	4.0
Maintenance and support	-0.8	0.8	2.3	4.2	4.9	3.0
Operations	4.1	4.6	5.7	6.6	7.3	6.0
IT training and education	-1.6	0.4	3.0	3.7	4.9	3.0
Services total	0.4	2.8	3.6	4.5	5.2	4.1
Packaged software						
System infrastructure software	6.0	8.4	7.6	7.5	6.5	7.5
Appl. development and deployment	0.8	3.4	6.1	7.2	7.0	5.9
Applications	1.6	2.5	3.2	4.0	4.4	3.5
Packaged software total	3.2	5.1	5.7	6.2	5.9	5.7
Hardware						
Systems						
High-end enterprise servers	4.7	-6.4	-7.5	-4.5	-13.0	-7.9
Midrange enterprise servers	-28.7	3.2	-7.4	-6.2	6.8	-1.1
Volume servers	-0.7	4.2	2.7	2.1	2.5	2.8
Servers total	-8.1	-0.9	-4.4	-2.8	-2.7	-2.7
Personal computers	-4.2	2.4	2.6	2.2	1.0	2.0
Traditional workstations	-33.2	-24.0	-18.0	-14.0	-11.4	-17.0
Clients total	-4.2	2.4	2.6	2.2	1.0	2.0
Systems total	-5.5	1.4	0.6	0.9	0.0	0.7
Storage						
Disk systems	-5.2	1.4	1.9	2.3	2.5	2.0
Tape automation	1.5	5.0	5.5	4.5	4.2	4.8
Storage total	-4.3	1.9	2.4	2.6	2.7	2.4
Peripherals						
Printers and MFPs	11.5	5.0	5.4	4.0	5.6	5.0
Smart handheld devices	-6.7	9.7	13.2	13.7	13.2	12.5
Other add-ons	-16.0	2.5	-0.3	-2.9	1.0	0.0
Peripherals total	4.6	5.0	5.2	4.0	5.8	5.0
Networking equipment	-8.5	4.7	7.7	3.7	7.4	5.9
Hardware total	-4.1	2.4	2.3	1.9	2.1	2.2
Packaged software total	3.2	5.1	5.7	6.2	5.9	5.7
Services total	0.4	2.8	3.6	4.5	5.2	4.1
Total IT	-1.2	3.0	3.4	3.7	4.0	3.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 244

PROPORTIONS OF IT SPENDING CATEGORIES IN JAPAN, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.4	4.4	4.4	4.4	4.4	4.4
Implementation	15.0	15.1	15.2	15.2	15.3	15.4
Maintenance and support	10.1	10.2	9.9	9.8	9.9	10.0
Operations	7.4	7.8	7.9	8.1	8.3	8.6
IT training and education	1.8	1.8	1.8	1.8	1.8	1.8
Services total	38.7	39.3	39.3	39.4	39.7	40.1
Packaged software						
System infrastructure software	6.5	6.9	7.3	7.6	7.9	8.0
Appl. development and deployment	3.5	3.6	3.6	3.7	3.8	4.0
Applications	6.2	6.3	6.3	6.3	6.3	6.3
Packaged software total	16.2	16.9	17.2	17.6	18.0	18.3
Hardware						
Systems						
High-end enterprise servers	3.3	3.5	3.2	2.8	2.6	2.2
Midrange enterprise servers	2.8	2.0	2.0	1.8	1.6	1.7
Volume servers	2.2	2.2	2.2	2.2	2.2	2.1
Servers total	8.3	7.7	7.4	6.9	6.4	6.0
Personal computers	21.0	20.3	20.2	20.0	19.7	19.2
Traditional workstations	0.3	0.2	0.1	0.1	0.1	0.1
Clients total	21.0	20.3	20.2	20.0	19.7	19.2
Systems total	29.5	28.2	27.8	27.0	26.3	25.3
Storage						
Disk systems	3.3	3.1	3.1	3.0	3.0	3.0
Tape automation	0.5	0.5	0.5	0.5	0.5	0.5
Storage total	3.8	3.7	3.6	3.6	3.6	3.5
Peripherals						
Printers and MFPs	5.3	6.0	6.1	6.3	6.3	6.4
Smart handheld devices	0.7	0.7	0.7	0.8	0.8	0.9
Other add-ons	1.4	1.2	1.2	1.1	1.1	1.0
Peripherals total	7.4	7.9	8.0	8.2	8.2	8.3
Networking equipment	4.4	4.1	4.1	4.3	4.3	4.4
Hardware total	45.1	43.8	43.5	43.0	42.3	41.5
Packaged software total	16.2	16.9	17.2	17.6	18.0	18.3
Services total	38.7	39.3	39.3	39.4	39.7	40.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 245

JAPAN PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	68.4	66.3	63.9	61.2	58.4	55.7
Implementation	63.9	61.8	59.5	57.1	54.6	52.3
Maintenance and support	69.5	67.8	65.7	63.6	61.9	60.3
Operations	61.2	60.2	59.0	57.5	55.9	54.5
IT training and education	54.9	52.4	48.8	46.0	43.8	41.9
Services total	64.7	62.9	60.7	58.5	56.3	54.4
Packaged software						
System infrastructure software	66.7	66.6	66.2	65.1	64.0	62.6
Appl. development and deployment	59.8	59.1	57.2	55.5	53.8	52.1
Applications	58.6	57.6	54.9	51.9	49.1	46.4
Packaged software total	61.9	61.4	59.7	57.7	55.8	53.8
Hardware						
Systems						
High-end enterprise servers	72.5	75.4	74.9	74.0	72.8	69.2
Midrange enterprise servers	55.5	46.7	44.5	40.5	38.0	38.7
Volume servers	41.1	39.3	37.4	35.1	32.7	30.4
Servers total	55.6	53.0	50.4	47.0	44.2	41.3
Personal computers	45.0	43.5	42.1	39.8	37.6	35.3
Traditional workstations	56.7	50.6	44.4	42.4	41.0	40.1
Clients total	45.1	43.5	42.1	39.8	37.6	35.4
Systems total	47.6	45.8	44.0	41.4	39.0	36.6
Storage						
Disk systems	55.2	54.8	53.7	52.5	51.6	51.5
Tape automation	60.4	59.5	59.8	60.1	60.2	60.3
Storage total	55.9	55.4	54.5	53.5	52.8	52.7
Peripherals						
Printers and MFPs	58.1	59.8	59.5	59.0	58.6	58.7
Smart handheld devices	40.0	31.0	25.9	23.2	21.2	19.2
Other add-ons	36.0	33.3	31.3	28.5	25.5	23.6
Peripherals total	50.2	49.9	47.8	45.6	43.4	41.6
Networking equipment	40.1	37.8	37.1	36.3	33.5	32.6
Hardware total	47.7	46.2	44.6	42.3	40.0	38.0
Packaged software total	61.9	61.4	59.7	57.7	55.8	53.8
Services total	64.7	62.9	60.7	58.5	56.3	54.4
Total IT	55.4	54.1	52.3	50.1	48.0	46.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 246

JAPAN PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	10.7	10.6	10.6	10.4	10.1	9.8
Implementation	10.1	10.0	10.0	9.8	9.6	9.4
Maintenance and support	9.8	9.4	9.1	8.7	8.4	8.2
Operations	10.1	10.0	9.8	9.6	9.4	9.4
IT training and education	7.6	7.6	7.5	7.5	7.3	7.2
Services total	9.9	9.8	9.6	9.4	9.2	9.0
Packaged software						
System infrastructure software	12.7	12.9	13.1	13.1	13.1	12.9
Appl. development and deployment	8.1	8.0	7.8	7.7	7.6	7.5
Applications	6.4	6.4	6.2	6.0	5.8	5.7
Packaged software total	8.5	8.5	8.5	8.3	8.2	8.1
Hardware						
Systems						
High-end enterprise servers	22.1	26.2	25.2	23.8	22.8	20.3
Midrange enterprise servers	17.1	13.4	13.3	11.7	10.9	11.0
Volume servers	9.3	8.9	8.5	8.1	7.6	7.4
Servers total	15.1	14.5	13.7	12.6	11.7	11.0
Personal computers	12.2	12.3	12.3	12.1	12.1	11.9
Traditional workstations	10.1	9.5	9.4	9.5	9.7	9.7
Clients total	12.2	12.2	12.3	12.1	12.1	11.9
Systems total	12.9	12.8	12.6	12.2	12.0	11.6
Storage						
Disk systems	13.6	13.2	13.2	13.0	12.8	12.6
Tape automation	15.6	15.7	16.0	16.1	16.0	15.8
Storage total	13.9	13.5	13.6	13.4	13.2	13.1
Peripherals						
Printers and MFPs	11.7	12.4	12.5	12.7	12.7	13.1
Smart handheld devices	8.3	5.3	3.8	3.1	2.8	2.6
Other add-ons	9.9	9.1	9.2	8.9	8.2	8.1
Peripherals total	10.9	10.6	10.0	9.4	8.9	8.6
Networking equipment	7.8	7.3	7.3	7.2	6.8	6.7
Hardware total	11.8	11.6	11.3	10.9	10.5	10.2
Packaged software total	8.5	8.5	8.5	8.3	8.2	8.1
Services total	9.9	9.8	9.6	9.4	9.2	9.0
Total IT	10.4	10.2	10.0	9.8	9.5	9.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 247

IT SPENDING IN KOREA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	322.2	352.0	400.3	455.6	514.6	576.7
Implementation	1,462.1	1,595.9	1,808.5	2,048.0	2,302.8	2,580.4
Maintenance and support	736.5	790.8	873.4	967.2	1,070.4	1,199.4
Operations	548.6	606.0	698.2	817.6	955.3	1,070.5
IT training and education	127.3	139.3	159.0	181.2	205.2	229.9
Services total	3,196.7	3,484.1	3,939.4	4,469.6	5,048.4	5,656.9
Packaged software						
System infrastructure software	519.3	571.9	639.5	717.3	795.2	876.0
Appl. development and deployment	397.7	384.4	401.1	434.8	484.2	529.7
Applications	756.2	763.6	818.1	918.3	1,016.4	1,138.7
Packaged software total	1,673.2	1,719.9	1,858.6	2,070.4	2,295.8	2,544.5
Hardware						
Systems						
High-end enterprise servers	360.9	335.3	338.5	328.9	327.4	347.3
Midrange enterprise servers	591.1	580.6	645.1	695.7	723.5	733.9
Volume servers	424.0	411.9	443.4	488.9	545.2	602.0
Servers total	1,376.1	1,327.8	1,426.9	1,513.5	1,596.0	1,683.2
Personal computers	3,437.7	3,244.2	3,541.9	3,829.4	4,066.7	4,226.0
Traditional workstations	47.7	38.3	39.6	29.3	22.7	18.4
Clients total	3,485.4	3,282.5	3,581.5	3,858.7	4,089.4	4,244.4
Systems total	4,861.5	4,610.3	5,008.4	5,372.2	5,685.5	5,927.6
Storage						
Disk systems	590.2	496.1	520.3	551.7	575.5	576.3
Tape automation	52.1	55.8	57.3	59.5	61.5	63.1
Storage total	642.3	552.0	577.6	611.2	637.1	639.4
Peripherals						
Printers and MFPs	566.0	551.9	557.7	564.3	562.8	557.5
Smart handheld devices	124.3	167.0	272.9	460.7	758.8	1,327.4
Other add-ons	398.8	369.2	416.6	458.8	497.4	533.5
Peripherals total	1,089.0	1,088.2	1,247.2	1,483.8	1,819.0	2,418.4
Networking equipment	1,036.3	937.1	997.1	1,079.5	1,207.9	1,331.2
Hardware total	7,629.1	7,187.5	7,830.3	8,546.7	9,349.5	10,316.6
Packaged software total	1,673.2	1,719.9	1,858.6	2,070.4	2,295.8	2,544.5
Services total	3,196.7	3,484.1	3,939.4	4,469.6	5,048.4	5,656.9
Total IT	12,499.0	12,391.6	13,628.3	15,086.6	16,693.7	18,518.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 248

GROWTH IN IT SPENDING IN KOREA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	9.2	13.7	13.8	13.0	12.1	13.1
Implementation	9.2	13.3	13.2	12.4	12.1	12.8
Maintenance and support	7.4	10.4	10.7	10.7	12.1	11.0
Operations	10.5	15.2	17.1	16.8	12.1	15.3
IT training and education	9.5	14.1	13.9	13.3	12.1	13.3
Services total	9.0	13.1	13.5	12.9	12.1	12.9
Packaged software						
System infrastructure software	10.1	11.8	12.2	10.9	10.2	11.2
Appl. development and deployment	-3.3	4.3	8.4	11.4	9.4	8.3
Applications	1.0	7.1	12.2	10.7	12.0	10.5
Packaged software total	2.8	8.1	11.4	10.9	10.8	10.3
Hardware						
Systems						
High-end enterprise servers	-7.1	1.0	-2.8	-0.5	6.1	0.9
Midrange enterprise servers	-1.8	11.1	7.8	4.0	1.4	6.0
Volume servers	-2.9	7.6	10.3	11.5	10.4	9.9
Servers total	-3.5	7.5	6.1	5.5	5.5	6.1
Personal computers	-5.6	9.2	8.1	6.2	3.9	6.8
Traditional workstations	-19.7	3.4	-26.1	-22.5	-18.9	-16.7
Clients total	-5.6	9.2	8.1	6.2	3.9	6.8
Systems total	-5.2	8.6	7.3	5.8	4.3	6.5
Storage						
Disk systems	-15.9	4.9	6.0	4.3	0.1	3.8
Tape automation	7.1	2.6	3.9	3.4	2.5	3.1
Storage total	-14.1	4.6	5.8	4.2	0.4	3.7
Peripherals						
Printers and MFPs	-2.5	1.0	1.2	-0.3	-0.9	0.3
Smart handheld devices	34.4	63.4	68.9	64.7	74.9	67.9
Other add-ons	-7.4	12.8	10.1	8.4	7.3	9.6
Peripherals total	-0.1	14.6	19.0	22.6	33.0	22.1
Networking equipment	-9.6	6.4	8.3	11.9	10.2	9.2
Hardware total	-5.8	8.9	9.1	9.4	10.3	9.5
Packaged software total	2.8	8.1	11.4	10.9	10.8	10.3
Services total	9.0	13.1	13.5	12.9	12.1	12.9
Total IT	-0.9	10.0	10.7	10.7	10.9	10.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 249

PROPORTIONS OF IT SPENDING CATEGORIES IN KOREA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.6	2.8	2.9	3.0	3.1	3.1
Implementation	11.7	12.9	13.3	13.6	13.8	13.9
Maintenance and support	5.9	6.4	6.4	6.4	6.4	6.5
Operations	4.4	4.9	5.1	5.4	5.7	5.8
IT training and education	1.0	1.1	1.2	1.2	1.2	1.2
Services total	25.6	28.1	28.9	29.6	30.2	30.5
Packaged software						
System infrastructure software	4.2	4.6	4.7	4.8	4.8	4.7
Appl. development and deployment	3.2	3.1	2.9	2.9	2.9	2.9
Applications	6.1	6.2	6.0	6.1	6.1	6.1
Packaged software total	13.4	13.9	13.6	13.7	13.8	13.7
Hardware						
Systems						
High-end enterprise servers	2.9	2.7	2.5	2.2	2.0	1.9
Midrange enterprise servers	4.7	4.7	4.7	4.6	4.3	4.0
Volume servers	3.4	3.3	3.3	3.2	3.3	3.3
Servers total	11.0	10.7	10.5	10.0	9.6	9.1
Personal computers	27.5	26.2	26.0	25.4	24.4	22.8
Traditional workstations	0.4	0.3	0.3	0.2	0.1	0.1
Clients total	27.5	26.2	26.0	25.4	24.4	22.8
Systems total	38.9	37.2	36.8	35.6	34.1	32.0
Storage						
Disk systems	4.7	4.0	3.8	3.7	3.4	3.1
Tape automation	0.4	0.5	0.4	0.4	0.4	0.3
Storage total	5.1	4.5	4.2	4.1	3.8	3.5
Peripherals						
Printers and MFPs	4.5	4.5	4.1	3.7	3.4	3.0
Smart handheld devices	1.0	1.3	2.0	3.1	4.5	7.2
Other add-ons	3.2	3.0	3.1	3.0	3.0	2.9
Peripherals total	8.7	8.8	9.2	9.8	10.9	13.1
Networking equipment	8.3	7.6	7.3	7.2	7.2	7.2
Hardware total	61.0	58.0	57.5	56.7	56.0	55.7
Packaged software total	13.4	13.9	13.6	13.7	13.8	13.7
Services total	25.6	28.1	28.9	29.6	30.2	30.5
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 250

KOREA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.6	5.9	6.3	6.7	7.0	7.1
Implementation	7.0	7.4	7.7	8.1	8.4	8.6
Maintenance and support	5.6	5.9	6.3	6.6	6.8	7.1
Operations	5.0	5.3	5.7	6.1	6.5	6.7
IT training and education	4.2	4.5	4.8	5.0	5.2	5.3
Services total	5.9	6.3	6.7	7.0	7.3	7.5
Packaged software						
System infrastructure software	6.0	6.2	6.4	6.5	6.6	6.7
Appl. development and deployment	7.5	7.1	6.9	6.9	6.9	6.8
Applications	8.0	7.8	7.8	8.0	8.1	8.2
Packaged software total	7.1	7.0	7.1	7.2	7.2	7.3
Hardware						
Systems						
High-end enterprise servers	8.9	8.2	8.8	9.1	9.3	10.8
Midrange enterprise servers	13.0	15.0	15.4	16.4	17.0	16.5
Volume servers	8.9	8.3	8.2	8.2	8.4	8.4
Servers total	10.3	10.3	10.6	11.0	11.2	11.3
Personal computers	8.2	7.8	8.1	8.0	7.9	7.6
Traditional workstations	11.4	12.2	14.5	12.5	10.9	9.8
Clients total	8.2	7.9	8.1	8.1	7.9	7.6
Systems total	8.7	8.4	8.7	8.7	8.6	8.4
Storage						
Disk systems	11.1	9.8	9.9	10.1	10.1	9.8
Tape automation	6.9	7.2	7.0	7.0	6.9	6.8
Storage total	10.6	9.4	9.5	9.6	9.7	9.4
Peripherals						
Printers and MFPs	6.9	6.2	5.9	5.6	5.4	5.0
Smart handheld devices	8.0	8.9	11.1	14.9	19.7	27.6
Other add-ons	11.4	11.7	12.1	12.2	12.1	11.9
Peripherals total	8.2	7.8	8.1	8.8	9.9	11.9
Networking equipment	10.5	9.8	9.8	9.6	9.6	9.6
Hardware total	9.0	8.5	8.8	8.9	9.0	9.3
Packaged software total	7.1	7.0	7.1	7.2	7.2	7.3
Services total	5.9	6.3	6.7	7.0	7.3	7.5
Total IT	7.7	7.6	7.8	8.0	8.2	8.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 251

KOREA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.9	1.0	1.0	1.1	1.2	1.3
Implementation	1.1	1.2	1.3	1.4	1.5	1.5
Maintenance and support	0.8	0.8	0.9	0.9	0.9	1.0
Operations	0.8	0.9	0.9	1.0	1.1	1.2
IT training and education	0.6	0.7	0.7	0.8	0.9	0.9
Services total	0.9	1.0	1.1	1.1	1.2	1.2
Packaged software						
System infrastructure software	1.1	1.2	1.3	1.3	1.3	1.4
Appl. development and deployment	1.0	1.0	0.9	1.0	1.0	1.0
Applications	0.9	0.9	0.9	0.9	1.0	1.0
Packaged software total	1.0	1.0	1.0	1.0	1.1	1.1
Hardware						
Systems						
High-end enterprise servers	2.7	2.8	2.9	2.9	2.9	3.2
Midrange enterprise servers	4.0	4.3	4.6	4.7	4.9	4.7
Volume servers	2.0	1.9	1.8	1.9	1.9	2.0
Servers total	2.8	2.8	2.9	2.9	3.0	3.0
Personal computers	2.2	2.2	2.4	2.4	2.5	2.6
Traditional workstations	2.0	2.3	3.1	2.8	2.6	2.4
Clients total	2.2	2.2	2.4	2.4	2.5	2.6
Systems total	2.4	2.4	2.5	2.6	2.6	2.7
Storage						
Disk systems	2.7	2.4	2.4	2.5	2.5	2.4
Tape automation	1.8	1.9	1.9	1.9	1.8	1.8
Storage total	2.6	2.3	2.4	2.4	2.4	2.3
Peripherals						
Printers and MFPs	1.4	1.3	1.2	1.2	1.2	1.1
Smart handheld devices	1.7	1.5	1.6	2.0	2.6	3.7
Other add-ons	3.1	3.2	3.6	3.8	3.9	4.1
Peripherals total	1.8	1.7	1.7	1.8	2.0	2.5
Networking equipment	2.1	1.9	1.9	1.9	1.9	2.0
Hardware total	2.2	2.1	2.2	2.3	2.4	2.5
Packaged software total	1.0	1.0	1.0	1.0	1.1	1.1
Services total	0.9	1.0	1.1	1.1	1.2	1.2
Total IT	1.4	1.4	1.5	1.6	1.6	1.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 252

IT SPENDING IN MALAYSIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	36.8	39.5	45.4	53.8	65.2	81.5
Implementation	145.7	154.8	178.2	213.0	260.6	324.5
Maintenance and support	113.5	124.3	144.5	173.1	211.5	258.9
Operations	53.2	62.1	74.8	93.0	119.5	153.4
IT training and education	54.5	62.3	72.5	85.8	103.3	127.6
Services total	403.7	442.9	515.4	618.7	760.1	945.9
Packaged software						
System infrastructure software	99.5	105.2	110.3	119.6	131.7	145.5
Appl. development and deployment	73.1	74.2	77.7	82.3	88.6	96.6
Applications	189.9	201.5	216.8	231.2	248.2	264.1
Packaged software total	362.5	380.9	404.8	433.0	468.6	506.2
Hardware						
Systems						
High-end enterprise servers	25.5	24.6	25.2	25.6	28.2	27.0
Midrange enterprise servers	62.9	59.8	61.2	64.7	68.3	75.5
Volume servers	69.7	81.7	87.6	98.4	112.1	126.3
Servers total	158.1	166.1	174.0	188.7	208.7	228.8
Personal computers	780.9	784.6	813.9	889.9	986.5	1,080.0
Traditional workstations	6.4	4.4	4.3	4.3	4.2	4.0
Clients total	787.4	789.0	818.2	894.2	990.7	1,084.0
Systems total	945.5	955.1	992.2	1,082.9	1,199.4	1,312.8
Storage						
Disk systems	71.3	66.1	68.4	71.2	80.9	90.6
Tape automation	15.5	15.3	15.9	16.7	17.5	18.2
Storage total	86.9	81.4	84.3	87.9	98.3	108.8
Peripherals						
Printers and MFPs	122.2	122.8	132.7	143.3	147.7	151.4
Smart handheld devices	34.1	57.5	73.3	88.2	103.2	119.7
Other add-ons	69.6	63.9	68.3	75.5	84.9	93.8
Peripherals total	226.0	244.2	274.3	307.0	335.8	365.0
Networking equipment	145.3	158.4	174.0	202.5	236.2	268.6
Hardware total	1,403.6	1,439.2	1,524.8	1,680.3	1,869.7	2,055.2
Packaged software total	362.5	380.9	404.8	433.0	468.6	506.2
Services total	403.7	442.9	515.4	618.7	760.1	945.9
Total IT	2,169.8	2,263.1	2,445.0	2,732.0	3,098.4	3,507.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 253

GROWTH IN IT SPENDING IN MALAYSIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	7.2	14.9	18.7	21.1	25.0	19.9
Implementation	6.2	15.2	19.5	22.3	24.5	20.3
Maintenance and support	9.5	16.3	19.8	22.2	22.4	20.1
Operations	16.9	20.4	24.3	28.5	28.4	25.4
IT training and education	14.2	16.4	18.3	20.4	23.5	19.6
Services total	9.7	16.4	20.0	22.8	24.4	20.9
Packaged software						
System infrastructure software	5.7	4.9	8.4	10.2	10.4	8.5
Appl. development and deployment	1.6	4.6	5.9	7.7	9.0	6.8
Applications	6.1	7.6	6.6	7.4	6.4	7.0
Packaged software total	5.1	6.3	7.0	8.2	8.0	7.4
Hardware						
Systems						
High-end enterprise servers	-3.6	2.7	1.5	10.2	-4.2	2.4
Midrange enterprise servers	-5.0	2.3	5.8	5.6	10.4	6.0
Volume servers	17.3	7.1	12.3	14.0	12.6	11.5
Servers total	5.1	4.7	8.4	10.6	9.6	8.3
Personal computers	0.5	3.7	9.3	10.9	9.5	8.3
Traditional workstations	-31.3	-1.2	-0.9	-1.6	-5.8	-2.4
Clients total	0.5	3.7	9.3	10.9	9.5	8.3
Systems total	1.0	3.9	9.1	10.8	9.5	8.3
Storage						
Disk systems	-7.3	3.4	4.1	13.6	12.0	8.2
Tape automation	-1.8	4.3	5.3	4.2	4.4	4.5
Storage total	-6.3	3.5	4.3	11.8	10.7	7.5
Peripherals						
Printers and MFPs	0.4	8.1	8.0	3.0	2.5	5.4
Smart handheld devices	68.6	27.3	20.3	17.1	16.0	20.1
Other add-ons	-8.1	6.9	10.4	12.5	10.5	10.1
Peripherals total	8.1	12.3	11.9	9.4	8.7	10.6
Networking equipment	9.1	9.9	16.4	16.7	13.7	14.1
Hardware total	2.5	5.9	10.2	11.3	9.9	9.3
Packaged software total	5.1	6.3	7.0	8.2	8.0	7.4
Services total	9.7	16.4	20.0	22.8	24.4	20.9
Total IT	4.3	8.0	11.7	13.4	13.2	11.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 254

PROPORTIONS OF IT SPENDING CATEGORIES IN MALAYSIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.7	1.7	1.9	2.0	2.1	2.3
Implementation	6.7	6.8	7.3	7.8	8.4	9.3
Maintenance and support	5.2	5.5	5.9	6.3	6.8	7.4
Operations	2.5	2.7	3.1	3.4	3.9	4.4
IT training and education	2.5	2.8	3.0	3.1	3.3	3.6
Services total	18.6	19.6	21.1	22.6	24.5	27.0
Packaged software						
System infrastructure software	4.6	4.6	4.5	4.4	4.3	4.1
Appl. development and deployment	3.4	3.3	3.2	3.0	2.9	2.8
Applications	8.8	8.9	8.9	8.5	8.0	7.5
Packaged software total	16.7	16.8	16.6	15.8	15.1	14.4
Hardware						
Systems						
High-end enterprise servers	1.2	1.1	1.0	0.9	0.9	0.8
Midrange enterprise servers	2.9	2.6	2.5	2.4	2.2	2.2
Volume servers	3.2	3.6	3.6	3.6	3.6	3.6
Servers total	7.3	7.3	7.1	6.9	6.7	6.5
Personal computers	36.0	34.7	33.3	32.6	31.8	30.8
Traditional workstations	0.3	0.2	0.2	0.2	0.1	0.1
Clients total	36.0	34.7	33.3	32.6	31.8	30.8
Systems total	43.6	42.2	40.6	39.6	38.7	37.4
Storage						
Disk systems	3.3	2.9	2.8	2.6	2.6	2.6
Tape automation	0.7	0.7	0.7	0.6	0.6	0.5
Storage total	4.0	3.6	3.4	3.2	3.2	3.1
Peripherals						
Printers and MFPs	5.6	5.4	5.4	5.2	4.8	4.3
Smart handheld devices	1.6	2.5	3.0	3.2	3.3	3.4
Other add-ons	3.2	2.8	2.8	2.8	2.7	2.7
Peripherals total	10.4	10.8	11.2	11.2	10.8	10.4
Networking equipment	6.7	7.0	7.1	7.4	7.6	7.7
Hardware total	64.7	63.6	62.4	61.5	60.3	58.6
Packaged software total	16.7	16.8	16.6	15.8	15.1	14.4
Services total	18.6	19.6	21.1	22.6	24.5	27.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 255

MALAYSIA PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.6	0.7	0.7	0.8	0.9	1.0
Implementation	0.7	0.7	0.8	0.8	0.9	1.1
Maintenance and support	0.9	0.9	1.0	1.2	1.4	1.5
Operations	0.5	0.5	0.6	0.7	0.8	1.0
IT training and education	1.8	2.0	2.2	2.4	2.6	2.9
Services total	0.8	0.8	0.9	1.0	1.1	1.3
Packaged software						
System infrastructure software	1.1	1.1	1.1	1.1	1.1	1.1
Appl. development and deployment	1.4	1.4	1.3	1.3	1.3	1.2
Applications	2.0	2.1	2.1	2.0	2.0	1.9
Packaged software total	1.5	1.6	1.5	1.5	1.5	1.5
Hardware						
Systems						
High-end enterprise servers	0.6	0.6	0.7	0.7	0.8	0.8
Midrange enterprise servers	1.4	1.5	1.5	1.5	1.6	1.7
Volume servers	1.5	1.6	1.6	1.7	1.7	1.8
Servers total	1.2	1.3	1.3	1.4	1.5	1.5
Personal computers	1.9	1.9	1.9	1.9	1.9	2.0
Traditional workstations	1.5	1.4	1.6	1.8	2.0	2.1
Clients total	1.9	1.9	1.9	1.9	1.9	2.0
Systems total	1.7	1.7	1.7	1.8	1.8	1.9
Storage						
Disk systems	1.3	1.3	1.3	1.3	1.4	1.5
Tape automation	2.1	2.0	2.0	2.0	2.0	2.0
Storage total	1.4	1.4	1.4	1.4	1.5	1.6
Peripherals						
Printers and MFPs	1.5	1.4	1.4	1.4	1.4	1.4
Smart handheld devices	2.2	3.1	3.0	2.9	2.7	2.5
Other add-ons	2.0	2.0	2.0	2.0	2.1	2.1
Peripherals total	1.7	1.7	1.8	1.8	1.8	1.8
Networking equipment	1.5	1.7	1.7	1.8	1.9	1.9
Hardware total	1.7	1.7	1.7	1.7	1.8	1.8
Packaged software total	1.5	1.6	1.5	1.5	1.5	1.5
Services total	0.8	0.8	0.9	1.0	1.1	1.3
Total IT	1.3	1.4	1.4	1.4	1.5	1.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 256

MALAYSIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.2	0.2
Implementation	0.1	0.1	0.1	0.1	0.2	0.2
Maintenance and support	0.1	0.1	0.1	0.2	0.2	0.2
Operations	0.1	0.1	0.1	0.1	0.1	0.2
IT training and education	0.3	0.3	0.3	0.4	0.4	0.5
Services total	0.1	0.1	0.1	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.2	0.2	0.2	0.2	0.3	0.2
Midrange enterprise servers	0.4	0.4	0.4	0.4	0.5	0.5
Volume servers	0.3	0.4	0.4	0.4	0.4	0.4
Servers total	0.3	0.4	0.4	0.4	0.4	0.4
Personal computers	0.5	0.5	0.5	0.6	0.6	0.7
Traditional workstations	0.3	0.3	0.3	0.4	0.5	0.5
Clients total	0.5	0.5	0.5	0.6	0.6	0.7
Systems total	0.5	0.5	0.5	0.5	0.6	0.6
Storage						
Disk systems	0.3	0.3	0.3	0.3	0.4	0.4
Tape automation	0.5	0.5	0.5	0.5	0.5	0.5
Storage total	0.4	0.3	0.3	0.3	0.4	0.4
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.5	0.5	0.4	0.4	0.4	0.3
Other add-ons	0.5	0.6	0.6	0.6	0.7	0.7
Peripherals total	0.4	0.4	0.4	0.4	0.4	0.4
Networking equipment	0.3	0.3	0.3	0.4	0.4	0.4
Hardware total	0.4	0.4	0.4	0.5	0.5	0.5
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.1	0.1	0.1	0.2	0.2	0.2
Total IT	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 257

IT SPENDING IN NEW ZEALAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	88.8	95.0	101.2	107.9	114.6	121.3
Implementation	353.8	378.5	401.9	427.7	454.3	481.6
Maintenance and support	156.0	164.6	173.0	180.7	189.7	197.6
Operations	201.5	216.0	231.2	246.7	263.4	278.0
IT training and education	59.5	63.5	66.3	69.3	72.3	75.3
Services total	859.6	917.7	973.6	1,032.3	1,094.3	1,153.8
Packaged software						
System infrastructure software	108.9	96.1	99.5	106.9	114.2	123.1
Appl. development and deployment	81.2	68.1	70.6	74.3	79.6	85.0
Applications	96.7	78.3	82.1	86.1	91.1	97.4
Packaged software total	286.7	242.6	252.2	267.3	284.9	305.4
Hardware						
Systems						
High-end enterprise servers	7.2	3.9	3.2	3.3	3.4	4.9
Midrange enterprise servers	22.8	20.4	22.2	23.1	23.6	22.8
Volume servers	76.7	68.9	75.9	80.6	84.6	89.9
Servers total	106.7	93.1	101.2	107.0	111.6	117.6
Personal computers	447.5	408.9	425.8	442.0	460.3	478.6
Traditional workstations	1.1	0.7	0.6	0.6	0.5	0.5
Clients total	448.6	409.6	426.4	442.6	460.8	479.1
Systems total	555.3	502.7	527.7	549.6	572.5	596.7
Storage						
Disk systems	43.2	36.8	38.4	39.5	39.7	39.0
Tape automation	7.6	7.2	7.4	7.5	7.7	7.9
Storage total	50.7	43.9	45.8	47.0	47.4	46.9
Peripherals						
Printers and MFPs	57.6	50.5	49.3	49.9	49.6	49.5
Smart handheld devices	6.0	9.1	11.3	10.6	10.5	12.5
Other add-ons	42.9	36.3	39.5	42.8	47.4	52.2
Peripherals total	106.4	95.9	100.1	103.3	107.5	114.1
Networking equipment	118.7	102.3	103.9	110.0	118.3	126.8
Hardware total	831.2	744.9	777.4	809.9	845.7	884.5
Packaged software total	286.7	242.6	252.2	267.3	284.9	305.4
Services total	859.6	917.7	973.6	1,032.3	1,094.3	1,153.8
Total IT	1,977.5	1,905.1	2,003.2	2,109.6	2,224.8	2,343.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 258

GROWTH IN IT SPENDING IN NEW ZEALAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	7.0	6.5	6.6	6.2	5.8	6.3
Implementation	7.0	6.2	6.4	6.2	6.0	6.2
Maintenance and support	5.5	5.1	4.5	4.9	4.2	4.7
Operations	7.2	7.0	6.7	6.8	5.5	6.5
IT training and education	6.8	4.4	4.6	4.3	4.2	4.4
Services total	6.8	6.1	6.0	6.0	5.4	5.9
Packaged software						
System infrastructure software	-11.7	3.6	7.5	6.8	7.8	6.4
Appl. development and deployment	-16.0	3.6	5.3	7.2	6.7	5.7
Applications	-19.0	4.8	4.9	5.8	6.9	5.6
Packaged software total	-15.4	4.0	6.0	6.6	7.2	5.9
Hardware						
Systems						
High-end enterprise servers	-46.6	-16.9	3.5	3.3	42.5	6.1
Midrange enterprise servers	-10.8	8.8	4.3	2.2	-3.5	2.9
Volume servers	-10.1	10.1	6.2	5.0	6.3	6.9
Servers total	-12.7	8.7	5.7	4.3	5.3	6.0
Personal computers	-8.6	4.2	3.8	4.2	4.0	4.0
Traditional workstations	-33.1	-21.3	4.8	-21.3	4.9	-9.1
Clients total	-8.6	4.2	3.8	4.2	4.0	4.0
Systems total	-9.5	5.0	4.2	4.2	4.2	4.4
Storage						
Disk systems	-14.9	4.5	2.8	0.6	-1.7	1.5
Tape automation	-5.3	2.9	2.2	2.1	2.3	2.4
Storage total	-13.4	4.2	2.7	0.8	-1.1	1.6
Peripherals						
Printers and MFPs	-12.3	-2.3	1.2	-0.6	-0.3	-0.5
Smart handheld devices	50.8	24.8	-6.6	-0.3	18.7	8.4
Other add-ons	-15.2	8.6	8.4	10.8	10.0	9.4
Peripherals total	-9.9	4.4	3.2	4.1	6.1	4.5
Networking equipment	-13.8	1.5	5.9	7.5	7.2	5.5
Hardware total	-10.4	4.4	4.2	4.4	4.6	4.4
Packaged software total	-15.4	4.0	6.0	6.6	7.2	5.9
Services total	6.8	6.1	6.0	6.0	5.4	5.9
Total IT	-3.7	5.1	5.3	5.5	5.3	5.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 259

PROPORTIONS OF IT SPENDING CATEGORIES IN NEW ZEALAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.5	5.0	5.1	5.1	5.2	5.2
Implementation	17.9	19.9	20.1	20.3	20.4	20.5
Maintenance and support	7.9	8.6	8.6	8.6	8.5	8.4
Operations	10.2	11.3	11.5	11.7	11.8	11.9
IT training and education	3.0	3.3	3.3	3.3	3.2	3.2
Services total	43.5	48.2	48.6	48.9	49.2	49.2
Packaged software						
System infrastructure software	5.5	5.0	5.0	5.1	5.1	5.3
Appl. development and deployment	4.1	3.6	3.5	3.5	3.6	3.6
Applications	4.9	4.1	4.1	4.1	4.1	4.2
Packaged software total	14.5	12.7	12.6	12.7	12.8	13.0
Hardware						
Systems						
High-end enterprise servers	0.4	0.2	0.2	0.2	0.2	0.2
Midrange enterprise servers	1.2	1.1	1.1	1.1	1.1	1.0
Volume servers	3.9	3.6	3.8	3.8	3.8	3.8
Servers total	5.4	4.9	5.1	5.1	5.0	5.0
Personal computers	22.6	21.5	21.3	21.0	20.7	20.4
Traditional workstations	0.1	0.0	0.0	0.0	0.0	0.0
Clients total	22.6	21.5	21.3	21.0	20.7	20.4
Systems total	28.1	26.4	26.3	26.1	25.7	25.5
Storage						
Disk systems	2.2	1.9	1.9	1.9	1.8	1.7
Tape automation	0.4	0.4	0.4	0.4	0.3	0.3
Storage total	2.6	2.3	2.3	2.2	2.1	2.0
Peripherals						
Printers and MFPs	2.9	2.6	2.5	2.4	2.2	2.1
Smart handheld devices	0.3	0.5	0.6	0.5	0.5	0.5
Other add-ons	2.2	1.9	2.0	2.0	2.1	2.2
Peripherals total	5.4	5.0	5.0	4.9	4.8	4.9
Networking equipment	6.0	5.4	5.2	5.2	5.3	5.4
Hardware total	42.0	39.1	38.8	38.4	38.0	37.7
Packaged software total	14.5	12.7	12.6	12.7	12.8	13.0
Services total	43.5	48.2	48.6	48.9	49.2	49.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 260

NEW ZEALAND PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.5	1.6	1.6	1.6	1.5	1.5
Implementation	1.7	1.7	1.7	1.7	1.7	1.6
Maintenance and support	1.2	1.2	1.2	1.2	1.2	1.2
Operations	1.9	1.9	1.9	1.9	1.8	1.7
IT training and education	2.0	2.1	2.0	1.9	1.8	1.7
Services total	1.6	1.7	1.6	1.6	1.6	1.5
Packaged software						
System infrastructure software	1.3	1.0	1.0	1.0	0.9	0.9
Appl. development and deployment	1.5	1.3	1.2	1.2	1.1	1.1
Applications	1.0	0.8	0.8	0.8	0.7	0.7
Packaged software total	1.2	1.0	1.0	0.9	0.9	0.9
Hardware						
Systems						
High-end enterprise servers	0.2	0.1	0.1	0.1	0.1	0.2
Midrange enterprise servers	0.5	0.5	0.5	0.5	0.6	0.5
Volume servers	1.6	1.4	1.4	1.4	1.3	1.3
Servers total	0.8	0.7	0.8	0.8	0.8	0.8
Personal computers	1.1	1.0	1.0	0.9	0.9	0.9
Traditional workstations	0.3	0.2	0.2	0.3	0.2	0.3
Clients total	1.1	1.0	1.0	0.9	0.9	0.9
Systems total	1.0	0.9	0.9	0.9	0.9	0.8
Storage						
Disk systems	0.8	0.7	0.7	0.7	0.7	0.7
Tape automation	1.0	0.9	0.9	0.9	0.9	0.9
Storage total	0.8	0.7	0.8	0.7	0.7	0.7
Peripherals						
Printers and MFPs	0.7	0.6	0.5	0.5	0.5	0.4
Smart handheld devices	0.4	0.5	0.5	0.3	0.3	0.3
Other add-ons	1.2	1.1	1.1	1.1	1.2	1.2
Peripherals total	0.8	0.7	0.7	0.6	0.6	0.6
Networking equipment	1.2	1.1	1.0	1.0	0.9	0.9
Hardware total	1.0	0.9	0.9	0.8	0.8	0.8
Packaged software total	1.2	1.0	1.0	0.9	0.9	0.9
Services total	1.6	1.7	1.6	1.6	1.6	1.5
Total IT	1.2	1.2	1.1	1.1	1.1	1.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 261

NEW ZEALAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.3	0.3	0.3	0.3	0.3
Implementation	0.3	0.3	0.3	0.3	0.3	0.3
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.3	0.3	0.3	0.3	0.3	0.3
IT training and education	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.2	0.3	0.3	0.3	0.3	0.3
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.2	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.1	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.2	0.2	0.2	0.2	0.2	0.1
Volume servers	0.4	0.3	0.3	0.3	0.3	0.3
Servers total	0.2	0.2	0.2	0.2	0.2	0.2
Personal computers	0.3	0.3	0.3	0.3	0.3	0.3
Traditional workstations	0.0	0.0	0.0	0.1	0.1	0.1
Clients total	0.3	0.3	0.3	0.3	0.3	0.3
Systems total	0.3	0.3	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.3	0.2	0.2	0.2	0.2	0.2
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.1	0.1	0.1	0.0	0.0	0.0
Other add-ons	0.3	0.3	0.3	0.4	0.4	0.4
Peripherals total	0.2	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.2	0.2	0.2	0.2	0.2	0.2
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.2	0.1	0.1	0.1	0.1	0.1
Services total	0.2	0.3	0.3	0.3	0.3	0.3
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 262

IT SPENDING IN THE PHILIPPINES, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	38.1	41.1	43.9	46.9	50.0	53.1
Implementation	149.0	160.7	172.0	183.4	195.8	208.3
Maintenance and support	48.4	52.4	55.9	59.5	62.7	66.1
Operations	54.5	59.2	63.6	68.2	72.4	76.9
IT training and education	28.8	32.4	36.0	40.4	44.9	49.3
Services total	318.8	345.7	371.3	398.4	425.9	453.8
Packaged software						
System infrastructure software	31.1	36.2	39.7	43.2	47.1	51.6
Appl. development and deployment	24.4	25.9	26.8	28.6	30.9	33.6
Applications	47.1	52.7	57.3	64.0	70.4	77.1
Packaged software total	102.6	114.7	123.8	135.7	148.5	162.4
Hardware						
Systems						
High-end enterprise servers	12.6	11.7	10.8	9.6	9.8	12.0
Midrange enterprise servers	24.8	28.0	32.5	37.6	41.7	44.0
Volume servers	29.8	38.7	53.3	66.6	71.8	79.6
Servers total	67.2	78.4	96.7	113.9	123.3	135.7
Personal computers	298.2	333.4	412.8	477.5	533.7	620.1
Traditional workstations	0.9	0.7	0.6	0.6	0.5	0.5
Clients total	299.0	334.1	413.4	478.1	534.2	620.6
Systems total	366.2	412.5	510.0	592.0	657.5	756.3
Storage						
Disk systems	30.4	26.7	30.0	30.9	31.2	30.6
Tape automation	3.0	2.8	3.2	3.4	3.5	3.6
Storage total	33.4	29.6	33.2	34.3	34.7	34.2
Peripherals						
Printers and MFPs	46.1	47.9	49.6	51.6	53.7	55.7
Smart handheld devices	2.9	3.9	4.5	6.4	7.2	8.0
Other add-ons	27.9	29.4	36.6	42.7	48.9	57.1
Peripherals total	76.8	81.2	90.7	100.7	109.7	120.8
Networking equipment	62.3	67.6	76.9	89.1	104.1	117.9
Hardware total	538.8	590.8	710.8	816.1	906.0	1,029.2
Packaged software total	102.6	114.7	123.8	135.7	148.5	162.4
Services total	318.8	345.7	371.3	398.4	425.9	453.8
Total IT	960.2	1,051.3	1,205.9	1,350.3	1,480.4	1,645.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 263

GROWTH IN IT SPENDING IN THE PHILIPPINES, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	7.8	6.9	6.7	6.6	6.3	6.6
Implementation	7.8	7.0	6.7	6.8	6.4	6.7
Maintenance and support	8.3	6.7	6.5	5.4	5.3	6.0
Operations	8.7	7.4	7.2	6.2	6.2	6.8
IT training and education	12.5	11.1	12.3	11.0	9.9	11.1
Services total	8.5	7.4	7.3	6.9	6.6	7.0
Packaged software						
System infrastructure software	16.2	9.7	8.8	9.2	9.5	9.3
Appl. development and deployment	6.0	3.7	6.7	7.9	8.8	6.8
Applications	11.9	8.8	11.6	10.1	9.5	10.0
Packaged software total	11.8	7.9	9.7	9.4	9.4	9.1
Hardware						
Systems						
High-end enterprise servers	-6.7	-7.9	-10.9	1.5	23.1	0.7
Midrange enterprise servers	12.7	16.1	15.8	10.8	5.6	12.0
Volume servers	29.8	38.0	24.9	7.8	10.8	19.8
Servers total	16.6	23.3	17.8	8.3	10.0	14.7
Personal computers	11.8	23.8	15.7	11.8	16.2	16.8
Traditional workstations	-23.6	-14.2	-5.9	-4.6	-6.2	-7.8
Clients total	11.8	23.8	15.7	11.8	16.2	16.8
Systems total	12.6	23.6	16.1	11.1	15.0	16.4
Storage						
Disk systems	-12.2	12.2	3.2	0.8	-1.9	3.4
Tape automation	-4.3	11.9	5.7	5.2	2.7	6.3
Storage total	-11.5	12.2	3.4	1.2	-1.5	3.7
Peripherals						
Printers and MFPs	4.0	3.6	4.0	4.0	3.7	3.8
Smart handheld devices	35.4	14.1	43.8	11.7	12.0	19.7
Other add-ons	5.3	24.6	16.7	14.4	16.9	18.1
Peripherals total	5.6	11.7	11.1	8.9	10.1	10.4
Networking equipment	8.5	13.7	15.9	16.7	13.3	14.9
Hardware total	9.7	20.3	14.8	11.0	13.6	14.9
Packaged software total	11.8	7.9	9.7	9.4	9.4	9.1
Services total	8.5	7.4	7.3	6.9	6.6	7.0
Total IT	9.5	14.7	12.0	9.6	11.1	11.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 264

PROPORTIONS OF IT SPENDING CATEGORIES IN THE PHILIPPINES, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.0	3.9	3.6	3.5	3.4	3.2
Implementation	15.5	15.3	14.3	13.6	13.2	12.7
Maintenance and support	5.0	5.0	4.6	4.4	4.2	4.0
Operations	5.7	5.6	5.3	5.0	4.9	4.7
IT training and education	3.0	3.1	3.0	3.0	3.0	3.0
Services total	33.2	32.9	30.8	29.5	28.8	27.6
Packaged software						
System infrastructure software	3.2	3.4	3.3	3.2	3.2	3.1
Appl. development and deployment	2.5	2.5	2.2	2.1	2.1	2.0
Applications	4.9	5.0	4.8	4.7	4.8	4.7
Packaged software total	10.7	10.9	10.3	10.1	10.0	9.9
Hardware						
Systems						
High-end enterprise servers	1.3	1.1	0.9	0.7	0.7	0.7
Midrange enterprise servers	2.6	2.7	2.7	2.8	2.8	2.7
Volume servers	3.1	3.7	4.4	4.9	4.9	4.8
Servers total	7.0	7.5	8.0	8.4	8.3	8.2
Personal computers	31.1	31.7	34.2	35.4	36.1	37.7
Traditional workstations	0.1	0.1	0.0	0.0	0.0	0.0
Clients total	31.1	31.7	34.2	35.4	36.1	37.7
Systems total	38.1	39.2	42.3	43.8	44.4	46.0
Storage						
Disk systems	3.2	2.5	2.5	2.3	2.1	1.9
Tape automation	0.3	0.3	0.3	0.2	0.2	0.2
Storage total	3.5	2.8	2.8	2.5	2.3	2.1
Peripherals						
Printers and MFPs	4.8	4.6	4.1	3.8	3.6	3.4
Smart handheld devices	0.3	0.4	0.4	0.5	0.5	0.5
Other add-ons	2.9	2.8	3.0	3.2	3.3	3.5
Peripherals total	8.0	7.7	7.5	7.5	7.4	7.3
Networking equipment	6.5	6.4	6.4	6.6	7.0	7.2
Hardware total	56.1	56.2	58.9	60.4	61.2	62.6
Packaged software total	10.7	10.9	10.3	10.1	10.0	9.9
Services total	33.2	32.9	30.8	29.5	28.8	27.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 265

PHILIPPINES PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.7	0.7	0.7	0.7	0.7	0.7
Implementation	0.7	0.7	0.7	0.7	0.7	0.7
Maintenance and support	0.4	0.4	0.4	0.4	0.4	0.4
Operations	0.5	0.5	0.5	0.5	0.5	0.5
IT training and education	1.0	1.0	1.1	1.1	1.1	1.1
Services total	0.6	0.6	0.6	0.6	0.6	0.6
Packaged software						
System infrastructure software	0.4	0.4	0.4	0.4	0.4	0.4
Appl. development and deployment	0.5	0.5	0.5	0.5	0.4	0.4
Applications	0.5	0.5	0.5	0.6	0.6	0.6
Packaged software total	0.4	0.5	0.5	0.5	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.3	0.3	0.3	0.4
Midrange enterprise servers	0.5	0.7	0.8	0.9	1.0	1.0
Volume servers	0.6	0.8	1.0	1.1	1.1	1.1
Servers total	0.5	0.6	0.7	0.8	0.9	0.9
Personal computers	0.7	0.8	0.9	1.0	1.0	1.1
Traditional workstations	0.2	0.2	0.2	0.2	0.3	0.3
Clients total	0.7	0.8	0.9	1.0	1.0	1.1
Systems total	0.7	0.8	0.9	1.0	1.0	1.1
Storage						
Disk systems	0.6	0.5	0.6	0.6	0.5	0.5
Tape automation	0.4	0.4	0.4	0.4	0.4	0.4
Storage total	0.5	0.5	0.5	0.5	0.5	0.5
Peripherals						
Printers and MFPs	0.6	0.5	0.5	0.5	0.5	0.5
Smart handheld devices	0.2	0.2	0.2	0.2	0.2	0.2
Other add-ons	0.8	0.9	1.1	1.1	1.2	1.3
Peripherals total	0.6	0.6	0.6	0.6	0.6	0.6
Networking equipment	0.6	0.7	0.8	0.8	0.8	0.8
Hardware total	0.6	0.7	0.8	0.8	0.9	0.9
Packaged software total	0.4	0.5	0.5	0.5	0.5	0.5
Services total	0.6	0.6	0.6	0.6	0.6	0.6
Total IT	0.6	0.6	0.7	0.7	0.7	0.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 266

PHILIPPINES PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.1	0.1	0.1	0.1	0.1	0.1
IT training and education	0.1	0.2	0.2	0.2	0.2	0.2
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.2	0.2	0.2	0.3	0.3	0.3
Volume servers	0.1	0.2	0.2	0.3	0.3	0.3
Servers total	0.1	0.2	0.2	0.2	0.2	0.2
Personal computers	0.2	0.2	0.3	0.3	0.3	0.4
Traditional workstations	0.0	0.0	0.0	0.1	0.1	0.1
Clients total	0.2	0.2	0.3	0.3	0.3	0.4
Systems total	0.2	0.2	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.1	0.1	0.1	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.2	0.3	0.3	0.4	0.4	0.4
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.1	0.1	0.2	0.2	0.2
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 267

IT SPENDING IN SINGAPORE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	100.9	99.2	102.3	106.0	110.3	115.0
Implementation	400.2	396.6	408.8	423.6	440.9	459.7
Maintenance and support	242.2	253.1	260.9	270.3	281.4	293.3
Operations	177.7	194.5	200.5	207.8	216.3	225.5
IT training and education	157.8	161.9	166.9	172.9	180.0	187.6
Services total	1,078.8	1,105.3	1,139.5	1,180.5	1,228.9	1,281.2
Packaged software						
System infrastructure software	146.9	150.4	162.2	175.6	191.0	208.5
Appl. development and deployment	135.6	135.5	143.1	153.0	167.8	185.2
Applications	206.0	189.6	203.6	217.5	235.1	257.1
Packaged software total	488.5	475.5	508.8	546.0	593.9	650.7
Hardware						
Systems						
High-end enterprise servers	59.4	50.0	50.0	50.5	48.4	48.4
Midrange enterprise servers	109.1	96.9	103.8	113.8	123.7	132.4
Volume servers	118.8	127.2	131.2	137.0	141.9	146.6
Servers total	287.3	274.0	285.0	301.3	314.0	327.4
Personal computers	608.6	571.1	579.3	557.2	542.3	530.2
Traditional workstations	12.0	12.0	11.7	10.5	9.4	8.4
Clients total	620.7	583.1	591.0	567.7	551.7	538.7
Systems total	908.0	857.1	876.0	869.0	865.7	866.1
Storage						
Disk systems	115.1	95.1	93.8	94.9	95.3	96.4
Tape automation	22.2	22.5	22.6	23.3	23.7	24.3
Storage total	137.4	117.6	116.4	118.1	119.0	120.6
Peripherals						
Printers and MFPs	81.2	85.6	87.8	88.7	89.1	90.1
Smart handheld devices	49.9	66.9	90.1	112.3	147.0	167.7
Other add-ons	78.6	72.5	78.2	82.8	89.2	96.1
Peripherals total	209.7	225.0	256.1	283.9	325.3	353.9
Networking equipment	218.1	213.9	240.5	266.6	291.2	311.3
Hardware total	1,473.2	1,413.6	1,489.1	1,537.6	1,601.3	1,651.9
Packaged software total	488.5	475.5	508.8	546.0	593.9	650.7
Services total	1,078.8	1,105.3	1,139.5	1,180.5	1,228.9	1,281.2
Total IT	3,040.4	2,994.3	3,137.4	3,264.2	3,424.2	3,583.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 268

GROWTH IN IT SPENDING IN SINGAPORE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-1.6	3.1	3.6	4.1	4.3	3.8
Implementation	-0.9	3.1	3.6	4.1	4.2	3.8
Maintenance and support	4.5	3.1	3.6	4.1	4.2	3.8
Operations	9.5	3.1	3.6	4.1	4.3	3.8
IT training and education	2.6	3.1	3.6	4.1	4.3	3.8
Services total	2.5	3.1	3.6	4.1	4.2	3.8
Packaged software						
System infrastructure software	2.4	7.8	8.3	8.8	9.2	8.5
Appl. development and deployment	-0.1	5.6	6.9	9.7	10.4	8.1
Applications	-8.0	7.4	6.8	8.1	9.4	7.9
Packaged software total	-2.7	7.0	7.3	8.8	9.6	8.2
Hardware						
Systems						
High-end enterprise servers	-15.9	0.0	0.9	-4.0	-0.1	-0.8
Midrange enterprise servers	-11.2	7.1	9.7	8.7	7.0	8.1
Volume servers	7.1	3.2	4.4	3.6	3.3	3.6
Servers total	-4.6	4.0	5.7	4.2	4.2	4.5
Personal computers	-6.2	1.4	-3.8	-2.7	-2.2	-1.8
Traditional workstations	-0.4	-2.7	-10.5	-10.2	-10.0	-8.4
Clients total	-6.2	1.4	-3.8	-2.7	-2.2	-1.8
Systems total	-5.6	2.2	-0.8	-0.4	0.0	0.3
Storage						
Disk systems	-17.4	-1.4	1.1	0.4	1.1	0.3
Tape automation	1.0	0.5	3.1	2.0	2.2	1.9
Storage total	-14.4	-1.0	1.5	0.8	1.3	0.6
Peripherals						
Printers and MFPs	5.5	2.6	1.0	0.4	1.1	1.3
Smart handheld devices	34.0	34.6	24.7	30.8	14.1	25.8
Other add-ons	-7.8	7.9	5.9	7.8	7.6	7.3
Peripherals total	7.3	13.8	10.8	14.6	8.8	12.0
Networking equipment	-1.9	12.4	10.9	9.2	6.9	9.8
Hardware total	-4.0	5.3	3.3	4.1	3.2	4.0
Packaged software total	-2.7	7.0	7.3	8.8	9.6	8.2
Services total	2.5	3.1	3.6	4.1	4.2	3.8
Total IT	-1.5	4.8	4.0	4.9	4.7	4.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 269

PROPORTIONS OF IT SPENDING CATEGORIES IN SINGAPORE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.3	3.3	3.3	3.2	3.2	3.2
Implementation	13.2	13.2	13.0	13.0	12.9	12.8
Maintenance and support	8.0	8.5	8.3	8.3	8.2	8.2
Operations	5.8	6.5	6.4	6.4	6.3	6.3
IT training and education	5.2	5.4	5.3	5.3	5.3	5.2
Services total	35.5	36.9	36.3	36.2	35.9	35.7
Packaged software						
System infrastructure software	4.8	5.0	5.2	5.4	5.6	5.8
Appl. development and deployment	4.5	4.5	4.6	4.7	4.9	5.2
Applications	6.8	6.3	6.5	6.7	6.9	7.2
Packaged software total	16.1	15.9	16.2	16.7	17.3	18.2
Hardware						
Systems						
High-end enterprise servers	2.0	1.7	1.6	1.5	1.4	1.4
Midrange enterprise servers	3.6	3.2	3.3	3.5	3.6	3.7
Volume servers	3.9	4.2	4.2	4.2	4.1	4.1
Servers total	9.5	9.2	9.1	9.2	9.2	9.1
Personal computers	20.0	19.1	18.5	17.1	15.8	14.8
Traditional workstations	0.4	0.4	0.4	0.3	0.3	0.2
Clients total	20.0	19.1	18.5	17.1	15.8	14.8
Systems total	29.9	28.6	27.9	26.6	25.3	24.2
Storage						
Disk systems	3.8	3.2	3.0	2.9	2.8	2.7
Tape automation	0.7	0.8	0.7	0.7	0.7	0.7
Storage total	4.5	3.9	3.7	3.6	3.5	3.4
Peripherals						
Printers and MFPs	2.7	2.9	2.8	2.7	2.6	2.5
Smart handheld devices	1.6	2.2	2.9	3.4	4.3	4.7
Other add-ons	2.6	2.4	2.5	2.5	2.6	2.7
Peripherals total	6.9	7.5	8.2	8.7	9.5	9.9
Networking equipment	7.2	7.1	7.7	8.2	8.5	8.7
Hardware total	48.5	47.2	47.5	47.1	46.8	46.1
Packaged software total	16.1	15.9	16.2	16.7	17.3	18.2
Services total	35.5	36.9	36.3	36.2	35.9	35.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 270

SINGAPORE PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.7	1.7	1.6	1.6	1.5	1.4
Implementation	1.9	1.8	1.8	1.7	1.6	1.5
Maintenance and support	1.9	1.9	1.9	1.8	1.8	1.7
Operations	1.6	1.7	1.6	1.6	1.5	1.4
IT training and education	5.3	5.2	5.0	4.8	4.5	4.3
Services total	2.0	2.0	1.9	1.9	1.8	1.7
Packaged software						
System infrastructure software	1.7	1.6	1.6	1.6	1.6	1.6
Appl. development and deployment	2.6	2.5	2.5	2.4	2.4	2.4
Applications	2.2	1.9	1.9	1.9	1.9	1.8
Packaged software total	2.1	1.9	1.9	1.9	1.9	1.9
Hardware						
Systems						
High-end enterprise servers	1.5	1.2	1.3	1.4	1.4	1.5
Midrange enterprise servers	2.4	2.5	2.5	2.7	2.9	3.0
Volume servers	2.5	2.6	2.4	2.3	2.2	2.0
Servers total	2.1	2.1	2.1	2.2	2.2	2.2
Personal computers	1.5	1.4	1.3	1.2	1.1	1.0
Traditional workstations	2.9	3.8	4.3	4.5	4.5	4.5
Clients total	1.5	1.4	1.3	1.2	1.1	1.0
Systems total	1.6	1.6	1.5	1.4	1.3	1.2
Storage						
Disk systems	2.2	1.9	1.8	1.7	1.7	1.6
Tape automation	2.9	2.9	2.8	2.7	2.7	2.6
Storage total	2.3	2.0	1.9	1.9	1.8	1.8
Peripherals						
Printers and MFPs	1.0	1.0	0.9	0.9	0.8	0.8
Smart handheld devices	3.2	3.6	3.7	3.6	3.8	3.5
Other add-ons	2.3	2.3	2.3	2.2	2.2	2.1
Peripherals total	1.6	1.6	1.7	1.7	1.8	1.7
Networking equipment	2.2	2.2	2.4	2.4	2.3	2.2
Hardware total	1.7	1.7	1.7	1.6	1.5	1.5
Packaged software total	2.1	1.9	1.9	1.9	1.9	1.9
Services total	2.0	2.0	1.9	1.9	1.8	1.7
Total IT	1.9	1.8	1.8	1.7	1.7	1.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 271

SINGAPORE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.3	0.3	0.3	0.3	0.3	0.3
Implementation	0.3	0.3	0.3	0.3	0.3	0.3
Maintenance and support	0.3	0.3	0.3	0.3	0.2	0.2
Operations	0.3	0.3	0.3	0.3	0.3	0.2
IT training and education	0.7	0.8	0.8	0.8	0.8	0.7
Services total	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software						
System infrastructure software	0.3	0.3	0.3	0.3	0.3	0.3
Appl. development and deployment	0.3	0.3	0.3	0.3	0.3	0.3
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Hardware						
Systems						
High-end enterprise servers	0.4	0.4	0.4	0.4	0.4	0.4
Midrange enterprise servers	0.7	0.7	0.7	0.8	0.8	0.8
Volume servers	0.6	0.6	0.5	0.5	0.5	0.5
Servers total	0.6	0.6	0.6	0.6	0.6	0.6
Personal computers	0.4	0.4	0.4	0.4	0.3	0.3
Traditional workstations	0.5	0.7	0.9	1.0	1.1	1.1
Clients total	0.4	0.4	0.4	0.4	0.3	0.3
Systems total	0.4	0.4	0.4	0.4	0.4	0.4
Storage						
Disk systems	0.5	0.5	0.4	0.4	0.4	0.4
Tape automation	0.8	0.8	0.7	0.7	0.7	0.7
Storage total	0.6	0.5	0.5	0.5	0.5	0.4
Peripherals						
Printers and MFPs	0.2	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.7	0.6	0.5	0.5	0.5	0.5
Other add-ons	0.6	0.6	0.7	0.7	0.7	0.7
Peripherals total	0.3	0.3	0.3	0.3	0.4	0.4
Networking equipment	0.4	0.4	0.5	0.5	0.5	0.5
Hardware total	0.4	0.4	0.4	0.4	0.4	0.4
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.3	0.3	0.3	0.3	0.3	0.3
Total IT	0.4	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 272

IT SPENDING IN TAIWAN, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	186.5	194.9	203.7	209.9	216.4	223.2
Implementation	444.9	461.6	479.5	493.9	509.3	526.1
Maintenance and support	249.6	254.8	261.3	269.1	277.0	286.4
Operations	245.8	250.7	257.0	264.7	274.7	287.3
IT training and education	159.2	164.3	171.0	179.2	187.7	196.7
Services total	1,286.1	1,326.2	1,372.5	1,416.7	1,465.1	1,519.6
Packaged software						
System infrastructure software	197.5	205.2	221.3	239.6	260.4	284.3
Appl. development and deployment	156.5	161.3	169.8	184.0	203.0	222.1
Applications	209.0	196.0	203.6	209.6	218.6	228.8
Packaged software total	563.0	562.5	594.6	633.1	682.0	735.2
Hardware						
Systems						
High-end enterprise servers	79.4	68.7	67.8	66.2	66.0	67.9
Midrange enterprise servers	134.0	136.9	150.5	162.1	164.9	167.9
Volume servers	207.8	236.7	266.4	291.8	333.1	369.5
Servers total	421.2	442.4	484.6	520.2	564.0	605.3
Personal computers	1,293.2	1,340.8	1,425.6	1,557.1	1,719.1	1,896.1
Traditional workstations	12.7	11.7	11.6	10.9	10.3	9.4
Clients total	1,305.9	1,352.5	1,437.2	1,567.9	1,729.4	1,905.5
Systems total	1,727.2	1,794.9	1,921.8	2,088.1	2,293.4	2,510.8
Storage						
Disk systems	160.9	146.8	149.1	151.0	148.1	145.6
Tape automation	16.9	19.5	20.0	20.7	21.4	22.0
Storage total	177.7	166.3	169.1	171.8	169.5	167.6
Peripherals						
Printers and MFPs	203.2	211.9	222.3	228.4	228.7	224.4
Smart handheld devices	71.7	88.6	92.0	101.5	111.6	120.9
Other add-ons	131.1	126.3	140.0	154.5	170.6	187.7
Peripherals total	406.0	426.9	454.2	484.4	510.9	533.1
Networking equipment	360.2	350.8	364.1	412.8	486.4	527.8
Hardware total	2,671.1	2,738.8	2,909.3	3,157.1	3,460.1	3,739.3
Packaged software total	563.0	562.5	594.6	633.1	682.0	735.2
Services total	1,286.1	1,326.2	1,372.5	1,416.7	1,465.1	1,519.6
Total IT	4,520.2	4,627.6	4,876.4	5,207.0	5,607.2	5,994.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 273

GROWTH IN IT SPENDING IN TAIWAN, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	4.5	4.6	3.0	3.1	3.1	3.4
Implementation	3.7	3.9	3.0	3.1	3.3	3.3
Maintenance and support	2.1	2.5	3.0	3.0	3.4	3.0
Operations	2.0	2.5	3.0	3.8	4.6	3.5
IT training and education	3.2	4.1	4.8	4.8	4.8	4.6
Services total	3.1	3.5	3.2	3.4	3.7	3.5
Packaged software						
System infrastructure software	3.9	7.8	8.2	8.7	9.2	8.5
Appl. development and deployment	3.1	5.2	8.4	10.3	9.4	8.3
Applications	-6.2	3.9	3.0	4.3	4.7	4.0
Packaged software total	-0.1	5.7	6.5	7.7	7.8	6.9
Hardware						
Systems						
High-end enterprise servers	-13.5	-1.4	-2.3	-0.3	2.9	-0.3
Midrange enterprise servers	2.2	9.9	7.8	1.7	1.9	5.2
Volume servers	13.9	12.6	9.5	14.1	10.9	11.8
Servers total	5.0	9.6	7.3	8.4	7.3	8.2
Personal computers	3.7	6.3	9.2	10.4	10.3	9.0
Traditional workstations	-7.6	-0.9	-6.5	-5.3	-8.4	-5.3
Clients total	3.7	6.3	9.2	10.4	10.3	9.0
Systems total	3.9	7.1	8.6	9.8	9.5	8.8
Storage						
Disk systems	-8.7	1.6	1.3	-2.0	-1.6	-0.2
Tape automation	15.7	2.5	3.6	3.3	2.6	3.0
Storage total	-6.4	1.7	1.6	-1.3	-1.1	0.2
Peripherals						
Printers and MFPs	4.3	4.9	2.8	0.1	-1.9	1.4
Smart handheld devices	23.5	3.8	10.4	9.9	8.4	8.1
Other add-ons	-3.6	10.8	10.4	10.4	10.0	10.4
Peripherals total	5.1	6.4	6.6	5.5	4.3	5.7
Networking equipment	-2.6	3.8	13.4	17.8	8.5	10.8
Hardware total	2.5	6.2	8.5	9.6	8.1	8.1
Packaged software total	-0.1	5.7	6.5	7.7	7.8	6.9
Services total	3.1	3.5	3.2	3.4	3.7	3.5
Total IT	2.4	5.4	6.8	7.7	6.9	6.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 274

PROPORTIONS OF IT SPENDING CATEGORIES IN TAIWAN, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.1	4.2	4.2	4.0	3.9	3.7
Implementation	9.8	10.0	9.8	9.5	9.1	8.8
Maintenance and support	5.5	5.5	5.4	5.2	4.9	4.8
Operations	5.4	5.4	5.3	5.1	4.9	4.8
IT training and education	3.5	3.6	3.5	3.4	3.3	3.3
Services total	28.5	28.7	28.1	27.2	26.1	25.4
Packaged software						
System infrastructure software	4.4	4.4	4.5	4.6	4.6	4.7
Appl. development and deployment	3.5	3.5	3.5	3.5	3.6	3.7
Applications	4.6	4.2	4.2	4.0	3.9	3.8
Packaged software total	12.5	12.2	12.2	12.2	12.2	12.3
Hardware						
Systems						
High-end enterprise servers	1.8	1.5	1.4	1.3	1.2	1.1
Midrange enterprise servers	3.0	3.0	3.1	3.1	2.9	2.8
Volume servers	4.6	5.1	5.5	5.6	5.9	6.2
Servers total	9.3	9.6	9.9	10.0	10.1	10.1
Personal computers	28.6	29.0	29.2	29.9	30.7	31.6
Traditional workstations	0.3	0.3	0.2	0.2	0.2	0.2
Clients total	28.6	29.0	29.2	29.9	30.7	31.6
Systems total	38.2	38.8	39.4	40.1	40.9	41.9
Storage						
Disk systems	3.6	3.2	3.1	2.9	2.6	2.4
Tape automation	0.4	0.4	0.4	0.4	0.4	0.4
Storage total	3.9	3.6	3.5	3.3	3.0	2.8
Peripherals						
Printers and MFPs	4.5	4.6	4.6	4.4	4.1	3.7
Smart handheld devices	1.6	1.9	1.9	1.9	2.0	2.0
Other add-ons	2.9	2.7	2.9	3.0	3.0	3.1
Peripherals total	9.0	9.2	9.3	9.3	9.1	8.9
Networking equipment	8.0	7.6	7.5	7.9	8.7	8.8
Hardware total	59.1	59.2	59.7	60.6	61.7	62.4
Packaged software total	12.5	12.2	12.2	12.2	12.2	12.3
Services total	28.5	28.7	28.1	27.2	26.1	25.4
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 275

TAIWAN PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.2	3.3	3.2	3.1	2.9	2.8
Implementation	2.1	2.1	2.1	2.0	1.9	1.8
Maintenance and support	1.9	1.9	1.9	1.8	1.8	1.7
Operations	2.3	2.2	2.1	2.0	1.9	1.8
IT training and education	5.3	5.3	5.1	4.9	4.7	4.5
Services total	2.4	2.4	2.3	2.2	2.1	2.0
Packaged software						
System infrastructure software	2.3	2.2	2.2	2.2	2.2	2.2
Appl. development and deployment	2.9	3.0	2.9	2.9	2.9	2.9
Applications	2.2	2.0	1.9	1.8	1.7	1.6
Packaged software total	2.4	2.3	2.3	2.2	2.2	2.1
Hardware						
Systems						
High-end enterprise servers	1.9	1.7	1.8	1.8	1.9	2.1
Midrange enterprise servers	2.9	3.5	3.6	3.8	3.9	3.8
Volume servers	4.3	4.8	4.9	4.9	5.1	5.1
Servers total	3.1	3.4	3.6	3.8	4.0	4.1
Personal computers	3.1	3.2	3.2	3.3	3.3	3.4
Traditional workstations	3.0	3.7	4.3	4.6	4.9	5.0
Clients total	3.1	3.2	3.3	3.3	3.3	3.4
Systems total	3.1	3.3	3.3	3.4	3.5	3.6
Storage						
Disk systems	3.0	2.9	2.8	2.8	2.6	2.5
Tape automation	2.2	2.5	2.5	2.4	2.4	2.4
Storage total	2.9	2.8	2.8	2.7	2.6	2.5
Peripherals						
Printers and MFPs	2.5	2.4	2.4	2.3	2.2	2.0
Smart handheld devices	4.6	4.7	3.8	3.3	2.9	2.5
Other add-ons	3.8	4.0	4.1	4.1	4.2	4.2
Peripherals total	3.1	3.1	3.0	2.9	2.8	2.6
Networking equipment	3.7	3.7	3.6	3.7	3.9	3.8
Hardware total	3.1	3.3	3.3	3.3	3.3	3.4
Packaged software total	2.4	2.3	2.3	2.2	2.2	2.1
Services total	2.4	2.4	2.3	2.2	2.1	2.0
Total IT	2.8	2.8	2.8	2.8	2.7	2.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 276

TAIWAN PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.5	0.5	0.5	0.5
Implementation	0.3	0.3	0.3	0.3	0.3	0.3
Maintenance and support	0.3	0.3	0.3	0.3	0.2	0.2
Operations	0.4	0.4	0.3	0.3	0.3	0.3
IT training and education	0.7	0.8	0.8	0.8	0.8	0.8
Services total	0.4	0.4	0.4	0.4	0.3	0.3
Packaged software						
System infrastructure software	0.4	0.4	0.4	0.4	0.4	0.4
Appl. development and deployment	0.4	0.4	0.4	0.4	0.4	0.4
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Hardware						
Systems						
High-end enterprise servers	0.6	0.6	0.6	0.6	0.6	0.6
Midrange enterprise servers	0.9	1.0	1.1	1.1	1.1	1.1
Volume servers	1.0	1.1	1.1	1.1	1.2	1.3
Servers total	0.9	0.9	1.0	1.0	1.0	1.1
Personal computers	0.8	0.9	0.9	1.0	1.1	1.2
Traditional workstations	0.5	0.7	0.9	1.0	1.2	1.2
Clients total	0.8	0.9	0.9	1.0	1.1	1.2
Systems total	0.8	0.9	1.0	1.0	1.1	1.1
Storage						
Disk systems	0.7	0.7	0.7	0.7	0.6	0.6
Tape automation	0.6	0.7	0.7	0.6	0.6	0.6
Storage total	0.7	0.7	0.7	0.7	0.6	0.6
Peripherals						
Printers and MFPs	0.5	0.5	0.5	0.5	0.5	0.5
Smart handheld devices	1.0	0.8	0.6	0.4	0.4	0.3
Other add-ons	1.0	1.1	1.2	1.3	1.3	1.4
Peripherals total	0.7	0.7	0.6	0.6	0.6	0.5
Networking equipment	0.7	0.7	0.7	0.7	0.8	0.8
Hardware total	0.8	0.8	0.8	0.8	0.9	0.9
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.4	0.4	0.4	0.4	0.3	0.3
Total IT	0.5	0.5	0.5	0.5	0.5	0.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 277

IT SPENDING IN THAILAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	32.7	38.7	45.5	51.8	58.9	66.2
Implementation	120.0	139.5	161.4	181.5	203.7	226.1
Maintenance and support	72.5	83.0	93.2	103.4	113.7	124.0
Operations	24.8	30.0	35.2	40.9	46.1	51.3
IT training and education	39.3	46.9	57.2	69.7	85.8	105.5
Services total	289.2	338.0	392.5	447.2	508.1	573.1
Packaged software						
System infrastructure software	56.5	59.2	64.8	70.8	77.9	84.0
Appl. development and deployment	39.1	39.9	42.3	45.2	49.3	54.0
Applications	55.4	60.6	67.5	75.8	85.5	96.1
Packaged software total	151.0	159.6	174.6	191.7	212.6	234.2
Hardware						
Systems						
High-end enterprise servers	37.0	32.0	30.0	31.1	32.6	32.6
Midrange enterprise servers	49.9	58.2	65.4	71.3	75.5	80.6
Volume servers	50.2	57.8	61.8	68.1	74.7	84.5
Servers total	137.1	148.0	157.2	170.5	182.8	197.8
Personal computers	745.4	796.3	694.4	760.4	818.7	891.6
Traditional workstations	2.0	1.8	1.6	1.4	1.3	1.1
Clients total	747.4	798.1	696.0	761.9	819.9	892.7
Systems total	884.5	946.0	853.2	932.4	1,002.7	1,090.6
Storage						
Disk systems	47.9	43.9	43.1	45.3	47.3	47.3
Tape automation	6.7	6.7	6.9	7.2	7.4	7.6
Storage total	54.6	50.6	50.1	52.5	54.7	54.9
Peripherals						
Printers and MFPs	133.9	133.4	144.9	150.8	152.1	154.0
Smart handheld devices	30.9	45.6	74.0	108.9	141.9	181.0
Other add-ons	68.2	66.9	64.5	72.9	80.4	88.7
Peripherals total	233.1	245.8	283.3	332.7	374.5	423.8
Networking equipment	100.6	110.2	132.0	156.2	186.5	208.2
Hardware total	1,272.7	1,352.7	1,318.6	1,473.7	1,618.4	1,777.4
Packaged software total	151.0	159.6	174.6	191.7	212.6	234.2
Services total	289.2	338.0	392.5	447.2	508.1	573.1
Total IT	1,712.9	1,850.3	1,885.7	2,112.7	2,339.2	2,584.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 278

GROWTH IN IT SPENDING IN THAILAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	18.4	17.7	13.8	13.7	12.4	14.4
Implementation	16.3	15.7	12.4	12.2	11.0	12.8
Maintenance and support	14.5	12.4	10.9	10.0	9.1	10.6
Operations	20.9	17.3	16.2	12.7	11.3	14.4
IT training and education	19.3	21.9	21.9	23.0	23.0	22.5
Services total	16.9	16.1	14.0	13.6	12.8	14.1
Packaged software						
System infrastructure software	4.7	9.4	9.3	10.0	7.9	9.2
Appl. development and deployment	2.1	6.0	6.8	9.2	9.6	7.9
Applications	9.3	11.5	12.2	12.7	12.5	12.2
Packaged software total	5.7	9.4	9.8	10.9	10.1	10.1
Hardware						
Systems						
High-end enterprise servers	-13.5	-6.2	3.8	4.9	0.0	0.5
Midrange enterprise servers	16.6	12.4	8.9	5.9	6.8	8.5
Volume servers	15.1	6.9	10.2	9.6	13.2	10.0
Servers total	8.0	6.2	8.5	7.2	8.2	7.5
Personal computers	6.8	-12.8	9.5	7.7	8.9	2.9
Traditional workstations	-11.2	-10.8	-8.3	-11.8	-11.3	-10.6
Clients total	6.8	-12.8	9.5	7.7	8.9	2.9
Systems total	7.0	-9.8	9.3	7.5	8.8	3.6
Storage						
Disk systems	-8.4	-1.8	5.0	4.5	-0.1	1.9
Tape automation	0.5	3.7	3.5	2.7	3.6	3.4
Storage total	-7.3	-1.0	4.8	4.2	0.4	2.1
Peripherals						
Printers and MFPs	-0.4	8.7	4.1	0.9	1.2	3.7
Smart handheld devices	47.5	62.3	47.2	30.3	27.6	41.2
Other add-ons	-1.9	-3.6	13.2	10.3	10.3	7.3
Peripherals total	5.5	15.3	17.4	12.6	13.2	14.6
Networking equipment	9.6	19.7	18.3	19.4	11.6	17.2
Hardware total	6.3	-2.5	11.8	9.8	9.8	7.1
Packaged software total	5.7	9.4	9.8	10.9	10.1	10.1
Services total	16.9	16.1	14.0	13.6	12.8	14.1
Total IT	8.0	1.9	12.0	10.7	10.5	8.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 279

PROPORTIONS OF IT SPENDING CATEGORIES IN THAILAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.9	2.1	2.4	2.5	2.5	2.6
Implementation	7.0	7.5	8.6	8.6	8.7	8.7
Maintenance and support	4.2	4.5	4.9	4.9	4.9	4.8
Operations	1.4	1.6	1.9	1.9	2.0	2.0
IT training and education	2.3	2.5	3.0	3.3	3.7	4.1
Services total	16.9	18.3	20.8	21.2	21.7	22.2
Packaged software						
System infrastructure software	3.3	3.2	3.4	3.3	3.3	3.3
Appl. development and deployment	2.3	2.2	2.2	2.1	2.1	2.1
Applications	3.2	3.3	3.6	3.6	3.7	3.7
Packaged software total	8.8	8.6	9.3	9.1	9.1	9.1
Hardware						
Systems						
High-end enterprise servers	2.2	1.7	1.6	1.5	1.4	1.3
Midrange enterprise servers	2.9	3.1	3.5	3.4	3.2	3.1
Volume servers	2.9	3.1	3.3	3.2	3.2	3.3
Servers total	8.0	8.0	8.3	8.1	7.8	7.7
Personal computers	43.5	43.0	36.8	36.0	35.0	34.5
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.0
Clients total	43.5	43.0	36.8	36.0	35.0	34.5
Systems total	51.6	51.1	45.2	44.1	42.9	42.2
Storage						
Disk systems	2.8	2.4	2.3	2.1	2.0	1.8
Tape automation	0.4	0.4	0.4	0.3	0.3	0.3
Storage total	3.2	2.7	2.7	2.5	2.3	2.1
Peripherals						
Printers and MFPs	7.8	7.2	7.7	7.1	6.5	6.0
Smart handheld devices	1.8	2.5	3.9	5.2	6.1	7.0
Other add-ons	4.0	3.6	3.4	3.5	3.4	3.4
Peripherals total	13.6	13.3	15.0	15.7	16.0	16.4
Networking equipment	5.9	6.0	7.0	7.4	8.0	8.1
Hardware total	74.3	73.1	69.9	69.8	69.2	68.8
Packaged software total	8.8	8.6	9.3	9.1	9.1	9.1
Services total	16.9	18.3	20.8	21.2	21.7	22.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 280

THAILAND PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.6	0.7	0.7	0.8	0.8	0.8
Implementation	0.6	0.6	0.7	0.7	0.7	0.8
Maintenance and support	0.6	0.6	0.7	0.7	0.7	0.7
Operations	0.2	0.3	0.3	0.3	0.3	0.3
IT training and education	1.3	1.5	1.7	1.9	2.2	2.4
Services total	0.5	0.6	0.7	0.7	0.7	0.8
Packaged software						
System infrastructure software	0.7	0.6	0.6	0.6	0.6	0.6
Appl. development and deployment	0.7	0.7	0.7	0.7	0.7	0.7
Applications	0.6	0.6	0.6	0.7	0.7	0.7
Packaged software total	0.6	0.7	0.7	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.9	0.8	0.8	0.9	0.9	1.0
Midrange enterprise servers	1.1	1.5	1.6	1.7	1.8	1.8
Volume servers	1.1	1.2	1.1	1.1	1.1	1.2
Servers total	1.0	1.1	1.2	1.2	1.3	1.3
Personal computers	1.8	1.9	1.6	1.6	1.6	1.6
Traditional workstations	0.5	0.6	0.6	0.6	0.6	0.6
Clients total	1.8	1.9	1.6	1.6	1.6	1.6
Systems total	1.6	1.7	1.5	1.5	1.5	1.6
Storage						
Disk systems	0.9	0.9	0.8	0.8	0.8	0.8
Tape automation	0.9	0.9	0.9	0.8	0.8	0.8
Storage total	0.9	0.9	0.8	0.8	0.8	0.8
Peripherals						
Printers and MFPs	1.6	1.5	1.5	1.5	1.5	1.4
Smart handheld devices	2.0	2.4	3.0	3.5	3.7	3.8
Other add-ons	2.0	2.1	1.9	1.9	2.0	2.0
Peripherals total	1.8	1.8	1.8	2.0	2.0	2.1
Networking equipment	1.0	1.2	1.3	1.4	1.5	1.5
Hardware total	1.5	1.6	1.5	1.5	1.6	1.6
Packaged software total	0.6	0.7	0.7	0.7	0.7	0.7
Services total	0.5	0.6	0.7	0.7	0.7	0.8
Total IT	1.1	1.1	1.1	1.1	1.1	1.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 281

THAILAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.1	0.1	0.1
IT training and education	0.2	0.2	0.3	0.3	0.4	0.4
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.3	0.3	0.3	0.3
Midrange enterprise servers	0.3	0.4	0.5	0.5	0.5	0.5
Volume servers	0.2	0.3	0.3	0.3	0.3	0.3
Servers total	0.3	0.3	0.3	0.3	0.3	0.4
Personal computers	0.5	0.5	0.5	0.5	0.5	0.5
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	0.5	0.5	0.5	0.5	0.5	0.5
Systems total	0.4	0.5	0.4	0.4	0.5	0.5
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.4	0.4	0.4	0.5	0.5	0.5
Other add-ons	0.5	0.6	0.5	0.6	0.6	0.7
Peripherals total	0.4	0.4	0.4	0.4	0.4	0.4
Networking equipment	0.2	0.2	0.3	0.3	0.3	0.3
Hardware total	0.4	0.4	0.4	0.4	0.4	0.4
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 282

IT SPENDING IN VIETNAM, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.0	5.0	6.0	7.0	8.2	9.5
Implementation	14.2	17.5	21.0	24.5	28.3	32.5
Maintenance and support	9.5	11.4	13.3	15.3	17.8	20.5
Operations	3.8	4.7	5.8	6.9	8.2	9.7
IT training and education	4.3	5.8	7.3	8.6	9.7	10.9
Services total	35.9	44.4	53.3	62.3	72.2	83.1
Packaged software						
System infrastructure software	6.0	6.8	7.9	9.2	10.6	12.4
Appl. development and deployment	4.9	4.9	5.1	5.3	5.5	5.6
Applications	2.3	2.4	2.6	2.7	3.0	3.3
Packaged software total	13.2	14.2	15.5	17.2	19.1	21.3
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	2.0	1.8	2.0	2.2	2.4	2.6
Volume servers	26.3	31.7	42.0	48.9	61.6	76.0
Servers total	28.4	33.5	44.0	51.1	64.0	78.6
Personal computers	200.7	230.4	265.3	322.0	383.9	448.7
Traditional workstations	1.7	1.8	1.9	2.0	1.8	1.7
Clients total	202.3	232.2	267.2	324.0	385.8	450.4
Systems total	230.7	265.7	311.2	375.1	449.8	529.1
Storage						
Disk systems	8.3	9.7	11.4	12.5	13.6	14.0
Tape automation	1.7	1.6	1.7	1.7	1.8	1.9
Storage total	9.9	11.4	13.0	14.3	15.4	15.8
Peripherals						
Printers and MFPs	47.3	50.5	56.2	62.3	63.8	65.1
Smart handheld devices	1.2	1.6	2.0	2.3	2.7	3.0
Other add-ons	15.7	16.1	19.1	23.4	28.1	33.0
Peripherals total	64.1	68.2	77.3	88.0	94.6	101.1
Networking equipment	39.5	37.4	40.4	45.4	50.7	56.1
Hardware total	344.2	382.7	441.9	522.8	610.5	702.1
Packaged software total	13.2	14.2	15.5	17.2	19.1	21.3
Services total	35.9	44.4	53.3	62.3	72.2	83.1
Total IT	393.3	441.3	510.8	602.3	701.8	806.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 283

GROWTH IN IT SPENDING IN VIETNAM, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	23.7	20.1	17.1	16.5	15.5	17.3
Implementation	23.3	19.4	16.7	15.9	14.7	16.7
Maintenance and support	19.4	16.7	15.3	16.1	15.5	15.9
Operations	22.8	24.0	19.7	18.6	17.8	20.0
IT training and education	36.0	25.6	17.5	13.2	12.4	17.1
Services total	23.8	20.1	16.8	16.0	15.0	17.0
Packaged software						
System infrastructure software	13.1	15.2	16.8	16.0	16.9	16.2
Appl. development and deployment	0.6	3.0	4.1	3.6	1.5	3.0
Applications	4.3	6.7	6.4	8.3	10.2	7.9
Packaged software total	6.9	9.5	10.9	10.9	11.4	10.7
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	-10.7	9.5	10.1	9.7	9.1	9.6
Volume servers	20.3	32.5	16.4	26.1	23.4	24.5
Servers total	18.1	31.3	16.1	25.4	22.8	23.8
Personal computers	14.8	15.1	21.4	19.2	16.9	18.1
Traditional workstations	9.4	3.8	6.0	-8.1	-6.5	-1.4
Clients total	14.8	15.1	21.4	19.2	16.9	18.1
Systems total	15.2	17.1	20.5	19.9	17.6	18.8
Storage						
Disk systems	18.0	16.7	10.1	8.4	3.0	9.4
Tape automation	-1.5	2.9	4.2	3.3	3.5	3.5
Storage total	14.7	14.8	9.3	7.8	3.1	8.7
Peripherals						
Printers and MFPs	6.9	11.3	10.8	2.4	2.0	6.6
Smart handheld devices	37.6	22.2	17.1	16.0	10.1	16.3
Other add-ons	2.7	18.8	22.4	20.0	17.5	19.6
Peripherals total	6.4	13.3	13.8	7.5	6.9	10.3
Networking equipment	-5.4	8.2	12.4	11.7	10.7	10.7
Hardware total	11.2	15.5	18.3	16.8	15.0	16.4
Packaged software total	6.9	9.5	10.9	10.9	11.4	10.7
Services total	23.8	20.1	16.8	16.0	15.0	17.0
Total IT	12.2	15.8	17.9	16.5	14.9	16.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 284

PROPORTIONS OF IT SPENDING CATEGORIES IN VIETNAM, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.0	1.1	1.2	1.2	1.2	1.2
Implementation	3.6	4.0	4.1	4.1	4.0	4.0
Maintenance and support	2.4	2.6	2.6	2.5	2.5	2.5
Operations	1.0	1.1	1.1	1.1	1.2	1.2
IT training and education	1.1	1.3	1.4	1.4	1.4	1.4
Services total	9.1	10.1	10.4	10.3	10.3	10.3
Packaged software						
System infrastructure software	1.5	1.5	1.5	1.5	1.5	1.5
Appl. development and deployment	1.2	1.1	1.0	0.9	0.8	0.7
Applications	0.6	0.5	0.5	0.5	0.4	0.4
Packaged software total	3.4	3.2	3.0	2.9	2.7	2.6
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.5	0.4	0.4	0.4	0.3	0.3
Volume servers	6.7	7.2	8.2	8.1	8.8	9.4
Servers total	7.2	7.6	8.6	8.5	9.1	9.7
Personal computers	51.0	52.2	51.9	53.5	54.7	55.6
Traditional workstations	0.4	0.4	0.4	0.3	0.3	0.2
Clients total	51.0	52.2	51.9	53.5	54.7	55.6
Systems total	58.7	60.2	60.9	62.3	64.1	65.6
Storage						
Disk systems	2.1	2.2	2.2	2.1	1.9	1.7
Tape automation	0.4	0.4	0.3	0.3	0.3	0.2
Storage total	2.5	2.6	2.6	2.4	2.2	2.0
Peripherals						
Printers and MFPs	12.0	11.4	11.0	10.3	9.1	8.1
Smart handheld devices	0.3	0.4	0.4	0.4	0.4	0.4
Other add-ons	4.0	3.6	3.7	3.9	4.0	4.1
Peripherals total	16.3	15.5	15.1	14.6	13.5	12.5
Networking equipment	10.0	8.5	7.9	7.5	7.2	7.0
Hardware total	87.5	86.7	86.5	86.8	87.0	87.1
Packaged software total	3.4	3.2	3.0	2.9	2.7	2.6
Services total	9.1	10.1	10.4	10.3	10.3	10.3
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 285

VIETNAM PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.1	0.1	0.1
IT training and education	0.1	0.2	0.2	0.2	0.2	0.3
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.0	0.0	0.0	0.1	0.1	0.1
Volume servers	0.6	0.6	0.8	0.8	0.9	1.1
Servers total	0.2	0.3	0.3	0.4	0.4	0.5
Personal computers	0.5	0.6	0.6	0.7	0.7	0.8
Traditional workstations	0.4	0.6	0.7	0.8	0.9	0.9
Clients total	0.5	0.6	0.6	0.7	0.7	0.8
Systems total	0.4	0.5	0.5	0.6	0.7	0.8
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.6	0.6	0.6	0.6	0.6	0.6
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.1
Other add-ons	0.4	0.5	0.6	0.6	0.7	0.7
Peripherals total	0.5	0.5	0.5	0.5	0.5	0.5
Networking equipment	0.4	0.4	0.4	0.4	0.4	0.4
Hardware total	0.4	0.5	0.5	0.5	0.6	0.6
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.2	0.3	0.3	0.3	0.3	0.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 286

VIETNAM PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.0	0.0	0.0
Implementation	0.0	0.0	0.0	0.0	0.0	0.0
Maintenance and support	0.0	0.0	0.0	0.0	0.0	0.0
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software						
System infrastructure software	0.0	0.0	0.0	0.0	0.0	0.0
Appl. development and deployment	0.0	0.0	0.0	0.0	0.0	0.0
Applications	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Volume servers	0.1	0.1	0.2	0.2	0.2	0.3
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.2	0.2	0.2	0.2	0.3
Traditional workstations	0.1	0.1	0.1	0.2	0.2	0.2
Clients total	0.1	0.2	0.2	0.2	0.2	0.3
Systems total	0.1	0.1	0.2	0.2	0.2	0.2
Storage						
Disk systems	0.0	0.0	0.1	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.1	0.1	0.2	0.2	0.2	0.3
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.2	0.2
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Total IT	0.0	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 287

IT SPENDING IN THE REST OF ASIA/PACIFIC, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	27.4	31.5	36.5	42.3	47.9	53.6
Implementation	98.1	113.0	131.2	152.5	172.3	192.0
Maintenance and support	65.4	76.6	90.8	107.5	126.7	148.2
Operations	29.0	34.6	42.2	50.2	59.2	68.8
IT training and education	30.2	34.1	39.2	46.6	53.3	60.8
Services total	250.1	289.8	339.8	399.2	459.4	523.5
Packaged software						
System infrastructure software	27.1	28.9	31.4	35.0	39.2	44.3
Appl. development and deployment	10.0	10.0	10.2	10.5	10.8	11.0
Applications	4.5	4.7	4.8	5.0	5.3	5.6
Packaged software total	41.6	43.6	46.5	50.6	55.2	60.9
Hardware						
Systems						
High-end enterprise servers	38.0	33.2	35.2	38.1	39.6	40.4
Midrange enterprise servers	31.7	31.3	37.0	43.6	47.2	51.3
Volume servers	20.3	25.5	27.6	37.4	48.7	62.6
Servers total	90.0	90.0	99.8	119.1	135.5	154.3
Personal computers	278.4	286.9	367.5	508.3	689.0	912.3
Traditional workstations	5.9	6.4	7.3	7.4	7.2	7.1
Clients total	284.2	293.3	374.8	515.7	696.2	919.3
Systems total	374.2	383.3	474.6	634.8	831.8	1,073.6
Storage						
Disk systems	56.4	62.6	73.1	84.0	90.0	92.0
Tape automation	4.9	4.8	4.9	5.1	5.3	5.5
Storage total	61.2	67.4	78.0	89.1	95.3	97.5
Peripherals						
Printers and MFPs	80.7	84.5	92.7	101.4	103.9	106.0
Smart handheld devices	3.5	3.7	3.5	4.0	4.4	5.0
Other add-ons	32.8	32.8	42.4	56.4	72.1	90.2
Peripherals total	116.9	121.0	138.6	161.9	180.3	201.2
Networking equipment	64.3	61.2	65.6	74.4	86.0	99.0
Hardware total	616.6	632.8	756.8	960.1	1,193.4	1,471.3
Packaged software total	41.6	43.6	46.5	50.6	55.2	60.9
Services total	250.1	289.8	339.8	399.2	459.4	523.5
Total IT	908.3	966.3	1,143.1	1,409.9	1,708.0	2,055.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 288

GROWTH IN IT SPENDING IN THE REST OF ASIA/PACIFIC, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	14.8	15.8	16.1	13.2	11.8	14.2
Implementation	15.2	16.1	16.3	13.0	11.4	14.2
Maintenance and support	17.1	18.5	18.4	17.8	17.0	17.9
Operations	19.5	21.8	19.0	17.9	16.3	18.7
IT training and education	13.0	15.1	18.9	14.3	14.1	15.6
Services total	15.9	17.3	17.5	15.1	13.9	15.9
Packaged software						
System infrastructure software	6.8	8.7	11.5	11.9	13.1	11.3
Appl. development and deployment	0.3	1.9	2.5	2.6	1.9	2.2
Applications	3.4	3.8	4.2	4.5	6.9	4.8
Packaged software total	4.8	6.6	8.8	9.2	10.3	8.7
Hardware						
Systems						
High-end enterprise servers	-12.5	6.0	8.1	4.1	1.9	5.0
Midrange enterprise servers	-1.4	18.4	17.7	8.2	8.8	13.2
Volume servers	26.0	8.1	35.6	30.2	28.5	25.1
Servers total	0.1	10.9	19.3	13.8	13.8	14.4
Personal computers	3.0	28.1	38.3	35.6	32.4	33.5
Traditional workstations	9.3	13.3	1.6	-2.4	-1.4	2.6
Clients total	3.0	28.1	38.3	35.6	32.4	33.5
Systems total	2.4	23.8	33.8	31.0	29.1	29.4
Storage						
Disk systems	11.1	16.7	15.0	7.1	2.2	10.1
Tape automation	-2.0	2.9	4.2	3.3	3.5	3.5
Storage total	10.0	15.8	14.3	6.9	2.3	9.7
Peripherals						
Printers and MFPs	4.7	9.7	9.4	2.4	2.0	5.8
Smart handheld devices	5.3	-4.7	15.2	9.5	12.7	7.9
Other add-ons	0.2	29.1	33.1	27.7	25.2	28.8
Peripherals total	3.5	14.6	16.8	11.4	11.6	13.6
Networking equipment	-4.8	7.2	13.4	15.6	15.2	12.8
Hardware total	2.6	19.6	26.9	24.3	23.3	23.5
Packaged software total	4.8	6.6	8.8	9.2	10.3	8.7
Services total	15.9	17.3	17.5	15.1	13.9	15.9
Total IT	6.4	18.3	23.3	21.1	20.4	20.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 289

PROPORTIONS OF IT SPENDING CATEGORIES IN THE REST OF ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.0	3.3	3.2	3.0	2.8	2.6
Implementation	10.8	11.7	11.5	10.8	10.1	9.3
Maintenance and support	7.2	7.9	7.9	7.6	7.4	7.2
Operations	3.2	3.6	3.7	3.6	3.5	3.3
IT training and education	3.3	3.5	3.4	3.3	3.1	3.0
Services total	27.5	30.0	29.7	28.3	26.9	25.5
Packaged software						
System infrastructure software	3.0	3.0	2.7	2.5	2.3	2.2
Appl. development and deployment	1.1	1.0	0.9	0.7	0.6	0.5
Applications	0.5	0.5	0.4	0.4	0.3	0.3
Packaged software total	4.6	4.5	4.1	3.6	3.2	3.0
Hardware						
Systems						
High-end enterprise servers	4.2	3.4	3.1	2.7	2.3	2.0
Midrange enterprise servers	3.5	3.2	3.2	3.1	2.8	2.5
Volume servers	2.2	2.6	2.4	2.7	2.9	3.0
Servers total	9.9	9.3	8.7	8.4	7.9	7.5
Personal computers	30.6	29.7	32.1	36.1	40.3	44.4
Traditional workstations	0.6	0.7	0.6	0.5	0.4	0.3
Clients total	30.6	29.7	32.1	36.1	40.3	44.4
Systems total	41.2	39.7	41.5	45.0	48.7	52.2
Storage						
Disk systems	6.2	6.5	6.4	6.0	5.3	4.5
Tape automation	0.5	0.5	0.4	0.4	0.3	0.3
Storage total	6.7	7.0	6.8	6.3	5.6	4.7
Peripherals						
Printers and MFPs	8.9	8.7	8.1	7.2	6.1	5.2
Smart handheld devices	0.4	0.4	0.3	0.3	0.3	0.2
Other add-ons	3.6	3.4	3.7	4.0	4.2	4.4
Peripherals total	12.9	12.5	12.1	11.5	10.6	9.8
Networking equipment	7.1	6.3	5.7	5.3	5.0	4.8
Hardware total	67.9	65.5	66.2	68.1	69.9	71.6
Packaged software total	4.6	4.5	4.1	3.6	3.2	3.0
Services total	27.5	30.0	29.7	28.3	26.9	25.5
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 290

REST OF ASIA/PACIFIC PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.6	0.6	0.6	0.7
Implementation	0.5	0.5	0.6	0.6	0.6	0.6
Maintenance and support	0.5	0.6	0.7	0.7	0.8	0.9
Operations	0.3	0.3	0.3	0.4	0.4	0.4
IT training and education	1.0	1.1	1.2	1.3	1.3	1.4
Services total	0.5	0.5	0.6	0.6	0.7	0.7
Packaged software						
System infrastructure software	0.3	0.3	0.3	0.3	0.3	0.3
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.1
Applications	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.9	0.8	0.9	1.1	1.1	1.3
Midrange enterprise servers	0.7	0.8	0.9	1.0	1.1	1.2
Volume servers	0.4	0.5	0.5	0.6	0.7	0.9
Servers total	0.7	0.7	0.7	0.9	0.9	1.0
Personal computers	0.7	0.7	0.8	1.1	1.3	1.6
Traditional workstations	1.4	2.0	2.7	3.2	3.5	3.8
Clients total	0.7	0.7	0.8	1.1	1.3	1.7
Systems total	0.7	0.7	0.8	1.0	1.3	1.5
Storage						
Disk systems	1.1	1.2	1.4	1.5	1.6	1.6
Tape automation	0.6	0.6	0.6	0.6	0.6	0.6
Storage total	1.0	1.1	1.3	1.4	1.4	1.4
Peripherals						
Printers and MFPs	1.0	0.9	1.0	1.0	1.0	1.0
Smart handheld devices	0.2	0.2	0.1	0.1	0.1	0.1
Other add-ons	0.9	1.0	1.2	1.5	1.8	2.0
Peripherals total	0.9	0.9	0.9	1.0	1.0	1.0
Networking equipment	0.7	0.6	0.6	0.7	0.7	0.7
Hardware total	0.7	0.8	0.8	1.0	1.2	1.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.5	0.5	0.6	0.6	0.7	0.7
Total IT	0.6	0.6	0.7	0.7	0.8	0.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 291

REST OF ASIA/PACIFIC PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.1	0.1	0.1	0.1
IT training and education	0.1	0.2	0.2	0.2	0.2	0.2
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.0	0.0	0.0	0.0	0.0	0.0
Applications	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.3	0.3	0.4	0.4
Midrange enterprise servers	0.2	0.2	0.3	0.3	0.3	0.3
Volume servers	0.1	0.1	0.1	0.1	0.2	0.2
Servers total	0.2	0.2	0.2	0.2	0.3	0.3
Personal computers	0.2	0.2	0.2	0.3	0.4	0.6
Traditional workstations	0.2	0.4	0.6	0.7	0.8	0.9
Clients total	0.2	0.2	0.2	0.3	0.4	0.6
Systems total	0.2	0.2	0.2	0.3	0.4	0.5
Storage						
Disk systems	0.3	0.3	0.3	0.4	0.4	0.4
Tape automation	0.2	0.2	0.2	0.2	0.2	0.2
Storage total	0.2	0.3	0.3	0.4	0.4	0.4
Peripherals						
Printers and MFPs	0.2	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.3	0.3	0.4	0.5	0.6	0.7
Peripherals total	0.2	0.2	0.2	0.2	0.2	0.2
Networking equipment	0.1	0.1	0.1	0.1	0.1	0.1
Hardware total	0.2	0.2	0.2	0.3	0.3	0.4
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 292

IT SPENDING IN APEJ, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1,827.4	1,994.8	2,289.4	2,650.3	3,080.0	3,572.3
Implementation	7,596.9	8,279.0	9,449.7	10,831.1	12,461.4	14,282.9
Maintenance and support	3,980.3	4,285.4	4,756.2	5,320.6	5,962.4	6,681.2
Operations	4,222.9	4,577.6	5,041.6	5,662.2	6,427.2	7,295.1
IT training and education	1,353.5	1,470.7	1,706.1	1,962.8	2,227.2	2,524.6
Services total	18,981.1	20,607.6	23,243.0	26,427.0	30,158.2	34,356.0
Packaged software						
System infrastructure software	2,897.3	3,075.6	3,402.2	3,838.7	4,343.4	4,906.6
Appl. development and deployment	2,138.1	2,218.9	2,476.7	2,815.1	3,240.3	3,703.4
Applications	3,907.7	4,138.0	4,738.9	5,517.6	6,424.2	7,479.7
Packaged software total	8,943.1	9,432.5	10,617.9	12,171.3	14,007.8	16,089.6
Hardware						
Systems						
High-end enterprise servers	1,121.4	1,008.4	969.0	939.3	954.9	991.8
Midrange enterprise servers	2,021.9	2,060.1	2,317.5	2,530.7	2,635.0	2,730.4
Volume servers	2,812.2	3,014.6	3,403.9	3,850.5	4,381.4	4,998.4
Servers total	5,955.5	6,083.1	6,690.4	7,320.5	7,971.3	8,720.5
Personal computers	23,039.9	23,434.9	25,446.5	28,671.0	32,171.1	35,757.0
Traditional workstations	181.9	155.8	151.7	134.8	122.7	112.9
Clients total	23,221.8	23,590.7	25,598.2	28,805.9	32,293.8	35,869.9
Systems total	29,177.3	29,673.8	32,288.6	36,126.4	40,265.1	44,590.4
Storage						
Disk systems	2,384.1	2,299.8	2,433.7	2,604.6	2,760.0	2,838.9
Tape automation	299.8	314.8	326.5	340.9	354.3	367.3
Storage total	2,683.9	2,614.6	2,760.2	2,945.5	3,114.3	3,206.2
Peripherals						
Printers and MFPs	3,455.3	3,596.1	3,823.6	4,107.2	4,342.8	4,570.5
Smart handheld devices	930.3	1,289.7	1,813.9	2,372.8	3,037.8	3,885.8
Other add-ons	2,234.1	2,111.6	2,369.0	2,697.5	3,055.0	3,423.0
Peripherals total	6,619.7	6,997.4	8,006.4	9,177.5	10,435.5	11,879.3
Networking equipment	5,900.5	5,950.6	6,411.4	7,154.5	8,396.8	9,382.1
Hardware total	44,381.5	45,236.5	49,466.6	55,403.9	62,211.7	69,058.0
Packaged software total	8,943.1	9,432.5	10,617.9	12,171.3	14,007.8	16,089.6
Services total	18,981.1	20,607.6	23,243.0	26,427.0	30,158.2	34,356.0
Total IT	72,305.7	75,276.5	83,327.5	94,002.2	106,377.7	119,503.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 293

GROWTH IN IT SPENDING IN APEJ, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	9.2	14.8	15.8	16.2	16.0	15.7
Implementation	9.0	14.1	14.6	15.1	14.6	14.6
Maintenance and support	7.7	11.0	11.9	12.1	12.1	11.7
Operations	8.4	10.1	12.3	13.5	13.5	12.4
IT training and education	8.7	16.0	15.0	13.5	13.4	14.5
Services total	8.6	12.8	13.7	14.1	13.9	13.6
Packaged software						
System infrastructure software	6.2	10.6	12.8	13.1	13.0	12.4
Appl. development and deployment	3.8	11.6	13.7	15.1	14.3	13.7
Applications	5.9	14.5	16.4	16.4	16.4	16.0
Packaged software total	5.5	12.6	14.6	15.1	14.9	14.3
Hardware						
Systems						
High-end enterprise servers	-10.1	-3.9	-3.1	1.7	3.9	-0.4
Midrange enterprise servers	1.9	12.5	9.2	4.1	3.6	7.3
Volume servers	7.2	12.9	13.1	13.8	14.1	13.5
Servers total	2.1	10.0	9.4	8.9	9.4	9.4
Personal computers	1.7	8.6	12.7	12.2	11.1	11.1
Traditional workstations	-14.3	-2.7	-11.1	-9.0	-7.9	-7.7
Clients total	1.7	8.6	12.7	12.2	11.1	11.1
Systems total	1.7	8.8	11.9	11.5	10.7	10.7
Storage						
Disk systems	-3.5	5.8	7.0	6.0	2.9	5.4
Tape automation	5.0	3.7	4.4	3.9	3.7	3.9
Storage total	-2.6	5.6	6.7	5.7	3.0	5.2
Peripherals						
Printers and MFPs	4.1	6.3	7.4	5.7	5.2	6.2
Smart handheld devices	38.6	40.6	30.8	28.0	27.9	31.7
Other add-ons	-5.5	12.2	13.9	13.3	12.0	12.8
Peripherals total	5.7	14.4	14.6	13.7	13.8	14.1
Networking equipment	0.8	7.7	11.6	17.4	11.7	12.1
Hardware total	1.9	9.4	12.0	12.3	11.0	11.2
Packaged software total	5.5	12.6	14.6	15.1	14.9	14.3
Services total	8.6	12.8	13.7	14.1	13.9	13.6
Total IT	4.1	10.7	12.8	13.2	12.3	12.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 294

PROPORTIONS OF IT SPENDING CATEGORIES IN APEJ, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.5	2.6	2.7	2.8	2.9	3.0
Implementation	10.5	11.0	11.3	11.5	11.7	12.0
Maintenance and support	5.5	5.7	5.7	5.7	5.6	5.6
Operations	5.8	6.1	6.1	6.0	6.0	6.1
IT training and education	1.9	2.0	2.0	2.1	2.1	2.1
Services total	26.3	27.4	27.9	28.1	28.4	28.7
Packaged software						
System infrastructure software	4.0	4.1	4.1	4.1	4.1	4.1
Appl. development and deployment	3.0	2.9	3.0	3.0	3.0	3.1
Applications	5.4	5.5	5.7	5.9	6.0	6.3
Packaged software total	12.4	12.5	12.7	12.9	13.2	13.5
Hardware						
Systems						
High-end enterprise servers	1.6	1.3	1.2	1.0	0.9	0.8
Midrange enterprise servers	2.8	2.7	2.8	2.7	2.5	2.3
Volume servers	3.9	4.0	4.1	4.1	4.1	4.2
Servers total	8.2	8.1	8.0	7.8	7.5	7.3
Personal computers	31.9	31.1	30.5	30.5	30.2	29.9
Traditional workstations	0.3	0.2	0.2	0.1	0.1	0.1
Clients total	31.9	31.1	30.5	30.5	30.2	29.9
Systems total	40.4	39.4	38.7	38.4	37.9	37.3
Storage						
Disk systems	3.3	3.1	2.9	2.8	2.6	2.4
Tape automation	0.4	0.4	0.4	0.4	0.3	0.3
Storage total	3.7	3.5	3.3	3.1	2.9	2.7
Peripherals						
Printers and MFPs	4.8	4.8	4.6	4.4	4.1	3.8
Smart handheld devices	1.3	1.7	2.2	2.5	2.9	3.3
Other add-ons	3.1	2.8	2.8	2.9	2.9	2.9
Peripherals total	9.2	9.3	9.6	9.8	9.8	9.9
Networking equipment	8.2	7.9	7.7	7.6	7.9	7.9
Hardware total	61.4	60.1	59.4	58.9	58.5	57.8
Packaged software total	12.4	12.5	12.7	12.9	13.2	13.5
Services total	26.3	27.4	27.9	28.1	28.4	28.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 295

APEJ PROPORTIONS OF THE IT SPENDING IN ASIA/PACIFIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	31.6	33.7	36.1	38.8	41.6	44.3
Implementation	36.1	38.2	40.5	42.9	45.4	47.7
Maintenance and support	30.5	32.2	34.3	36.4	38.1	39.7
Operations	38.8	39.8	41.0	42.5	44.1	45.5
IT training and education	45.1	47.6	51.2	54.0	56.2	58.1
Services total	35.3	37.1	39.3	41.5	43.7	45.6
Packaged software						
System infrastructure software	33.3	33.4	33.8	34.9	36.0	37.4
Appl. development and deployment	40.2	40.9	42.8	44.5	46.2	47.9
Applications	41.4	42.4	45.1	48.1	50.9	53.6
Packaged software total	38.1	38.6	40.3	42.3	44.2	46.2
Hardware						
Systems						
High-end enterprise servers	27.5	24.6	25.1	26.0	27.2	30.8
Midrange enterprise servers	44.5	53.3	55.5	59.5	62.0	61.3
Volume servers	58.9	60.7	62.6	64.9	67.3	69.6
Servers total	44.4	47.0	49.6	53.0	55.8	58.7
Personal computers	55.0	56.5	57.9	60.2	62.4	64.7
Traditional workstations	43.3	49.4	55.6	57.6	59.0	59.9
Clients total	54.9	56.5	57.9	60.2	62.4	64.6
Systems total	52.4	54.2	56.0	58.6	61.0	63.4
Storage						
Disk systems	44.8	45.2	46.3	47.5	48.4	48.5
Tape automation	39.6	40.5	40.2	39.9	39.8	39.7
Storage total	44.1	44.6	45.5	46.5	47.2	47.3
Peripherals						
Printers and MFPs	41.9	40.2	40.5	41.0	41.4	41.3
Smart handheld devices	60.0	69.0	74.1	76.8	78.8	80.8
Other add-ons	64.0	66.7	68.7	71.5	74.5	76.4
Peripherals total	49.8	50.1	52.2	54.4	56.6	58.4
Networking equipment	59.9	62.2	62.9	63.7	66.5	67.4
Hardware total	52.3	53.8	55.4	57.7	60.0	62.0
Packaged software total	38.1	38.6	40.3	42.3	44.2	46.2
Services total	35.3	37.1	39.3	41.5	43.7	45.6
Total IT	44.6	45.9	47.7	49.9	52.0	54.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 296

APEJ PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.9	5.4	6.0	6.6	7.2	7.8
Implementation	5.7	6.2	6.8	7.4	8.0	8.5
Maintenance and support	4.3	4.5	4.8	5.0	5.2	5.4
Operations	6.4	6.6	6.8	7.1	7.4	7.8
IT training and education	6.2	6.9	7.9	8.7	9.3	9.9
Services total	5.4	5.8	6.2	6.7	7.1	7.6
Packaged software						
System infrastructure software	6.4	6.5	6.7	7.0	7.4	7.7
Appl. development and deployment	5.5	5.5	5.9	6.2	6.6	6.9
Applications	4.5	4.7	5.1	5.5	6.0	6.6
Packaged software total	5.2	5.4	5.7	6.1	6.5	7.0
Hardware						
Systems						
High-end enterprise servers	8.4	8.5	8.4	8.4	8.5	9.1
Midrange enterprise servers	13.7	15.3	16.5	17.3	17.8	17.5
Volume servers	13.4	13.7	14.2	15.0	15.6	17.0
Servers total	12.1	12.9	13.5	14.2	14.8	15.6
Personal computers	14.9	15.9	16.9	18.3	20.1	21.7
Traditional workstations	7.7	9.3	11.8	12.9	14.0	14.5
Clients total	14.8	15.9	16.9	18.3	20.0	21.7
Systems total	14.2	15.1	16.0	17.3	18.7	20.1
Storage						
Disk systems	11.0	10.9	11.4	11.7	12.0	11.9
Tape automation	10.2	10.7	10.7	10.7	10.6	10.4
Storage total	11.0	10.9	11.3	11.6	11.8	11.7
Peripherals						
Printers and MFPs	8.4	8.3	8.5	8.8	9.0	9.2
Smart handheld devices	12.4	11.8	10.9	10.3	10.3	10.9
Other add-ons	17.6	18.2	20.2	22.4	24.0	26.2
Peripherals total	10.8	10.7	10.9	11.2	11.5	12.1
Networking equipment	11.7	12.0	12.3	12.7	13.6	13.9
Hardware total	13.0	13.5	14.1	14.9	15.8	16.6
Packaged software total	5.2	5.4	5.7	6.1	6.5	7.0
Services total	5.4	5.8	6.2	6.7	7.1	7.6
Total IT	8.4	8.7	9.2	9.7	10.3	10.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

CENTRAL AND EASTERN EUROPE

The outlook for the Central and Eastern European (CEE) IT market in 2003 is mixed with respect to various technology categories and countries. Technology expenditures in the region as a whole are projected to increase by 10.2%, to $17.6 billion. IDC's forecast for the year shows software spending in the lead with growth of 15.8% in 2003, followed by IT services at 13.6%. Overall IT spending growth is expected to come in at 10.2%.

The IT market in CEE is marked by rapid and fundamental shifts in growth trends and spending priorities. In most countries, investment in hardware is being overtaken by spending on services, networking equipment, and software as the market enters a solution-driven stage of development. This trend is expected to accelerate in coming years. Reflecting the very different stages of economic development across the region, national IT markets display large variations in levels of market maturity. Privatization, mergers, and acquisitions are part of the CEE landscape as the region continues to open sectors of the economy to competition and foreign investment.

The IT market in CEE is marked by rapid and fundamental shifts in growth trends and spending priorities.

The corporate sector as a whole continues to invest in more sophisticated IT tools, such as packaged software and IT services, in readiness for competition in the European Union (EU) marketplace and in recognition of the fact that IT can increase business process efficiency. Technology investment among small and medium-sized enterprises is expanding rapidly (and moving away from basic hardware), and this area represents a solid growth opportunity over our forecast horizon. Small and medium-sized businesses already account for nearly 60% of IT spending in the region. However, there still remains a tremendous amount of untapped opportunity in this market. Going forward, the market is expected to only gain in importance because corporate-level expenditures are starting to reach saturation levels. In some cases, this will require a rethink of IT vendor channel strategies. Government spending is also rising in an effort to meet EU norms, implement egovernment initiatives, and connect central and local administrations.

For several countries, EU accession is just around the corner. IT vendors are advised to consider a strategy that addresses the possible opportunities offered by EU-related infrastructure development in the public sector (e.g., the eEurope+ program and egovernment). EU accession also offers IT vendors a unique opportunity to leverage their experiences in Western Europe and to rethink their local marketing and sales strategies.

For several countries, EU accession is just around the corner.

Tables 297–350 illustrate IT spending forecasts for Central and Eastern Europe, with country-level detail for Bulgaria, Croatia, Czech Republic, Hungary, Poland, Romania, Russia, Slovakia, and Slovenia.

TABLE 297

IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	513.8	581.4	658.2	775.5	895.2	1,035.4
Implementation	2,052.3	2,334.6	2,649.5	3,040.5	3,476.3	3,980.7
Maintenance and support	1,070.0	1,195.9	1,331.9	1,506.8	1,715.4	1,962.0
Operations	264.7	317.9	377.2	468.9	574.9	687.5
IT training and education	267.1	305.7	346.8	400.5	474.8	549.9
Services total	4,167.8	4,735.5	5,363.6	6,192.2	7,136.5	8,215.5
Packaged software						
System infrastructure software	677.8	772.0	870.1	975.5	1,078.5	1,172.5
Appl. development and deployment	543.6	624.4	707.5	793.8	883.1	976.1
Applications	1,430.1	1,675.1	1,922.2	2,176.9	2,437.4	2,689.9
Packaged software total	2,651.6	3,071.5	3,499.8	3,946.2	4,399.0	4,838.4
Hardware						
Systems						
High-end enterprise servers	100.1	51.7	55.0	62.1	73.5	99.8
Midrange enterprise servers	277.7	300.6	306.1	333.8	357.9	375.5
Volume servers	765.9	815.1	922.1	1,027.2	1,134.8	1,236.8
Servers total	1,143.7	1,167.4	1,283.3	1,423.1	1,566.2	1,712.1
Personal computers	4,511.7	4,836.5	5,436.5	6,055.5	6,730.1	7,398.2
Traditional workstations	23.6	21.0	18.4	16.8	16.8	14.9
Clients total	4,535.2	4,857.5	5,454.9	6,072.4	6,746.9	7,413.1
Systems total	5,678.9	6,024.9	6,738.1	7,495.5	8,313.1	9,125.2
Storage						
Disk systems	279.8	307.1	359.0	413.3	473.7	528.3
Tape automation	82.8	85.7	87.0	92.8	97.2	100.6
Storage total	362.6	392.8	446.0	506.1	570.9	628.9
Peripherals						
Printers and MFPs	1,280.4	1,359.3	1,459.9	1,551.7	1,609.5	1,671.6
Smart handheld devices	48.3	60.1	74.2	83.6	94.0	106.4
Other add-ons	541.4	604.0	669.1	743.2	831.5	915.7
Peripherals total	1,870.1	2,023.4	2,203.2	2,378.5	2,535.0	2,693.6
Networking equipment	1,205.2	1,311.5	1,423.9	1,550.3	1,696.1	1,887.7
Hardware total	9,116.9	9,752.5	10,811.3	11,930.4	13,115.1	14,335.4
Packaged software total	2,651.6	3,071.5	3,499.8	3,946.2	4,399.0	4,838.4
Services total	4,167.8	4,735.5	5,363.6	6,192.2	7,136.5	8,215.5
Total IT	15,936.3	17,559.5	19,674.6	22,068.8	24,650.6	27,389.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 298

GROWTH IN IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	13.2	13.2	17.8	15.4	15.7	15.5
Implementation	13.8	13.5	14.8	14.3	14.5	14.3
Maintenance and support	11.8	11.4	13.1	13.8	14.4	13.2
Operations	20.1	18.7	24.3	22.6	19.6	21.3
IT training and education	14.5	13.4	15.5	18.6	15.8	15.8
Services total	13.6	13.3	15.5	15.2	15.1	14.8
Packaged software						
System infrastructure software	13.9	12.7	12.1	10.6	8.7	11.0
Appl. development and deployment	14.9	13.3	12.2	11.2	10.5	11.8
Applications	17.1	14.8	13.2	12.0	10.4	12.6
Packaged software total	15.8	13.9	12.8	11.5	10.0	12.0
Hardware						
Systems						
High-end enterprise servers	-48.4	6.5	12.8	18.4	35.8	17.9
Midrange enterprise servers	8.2	1.8	9.1	7.2	4.9	5.7
Volume servers	6.4	13.1	11.4	10.5	9.0	11.0
Servers total	2.1	9.9	10.9	10.1	9.3	10.0
Personal computers	7.2	12.4	11.4	11.1	9.9	11.2
Traditional workstations	-10.8	-12.7	-8.3	-0.3	-11.5	-8.3
Clients total	7.2	12.4	11.4	11.1	9.9	11.2
Systems total	6.1	11.8	11.2	10.9	9.8	10.9
Storage						
Disk systems	9.7	16.9	15.1	14.6	11.5	14.5
Tape automation	3.5	1.5	6.6	4.8	3.4	4.1
Storage total	8.3	13.6	13.5	12.8	10.2	12.5
Peripherals						
Printers and MFPs	6.2	7.4	6.3	3.7	3.9	5.3
Smart handheld devices	24.4	23.5	12.6	12.5	13.2	15.3
Other add-ons	11.6	10.8	11.1	11.9	10.1	11.0
Peripherals total	8.2	8.9	8.0	6.6	6.3	7.4
Networking equipment	8.8	8.6	8.9	9.4	11.3	9.5
Hardware total	7.0	10.9	10.4	9.9	9.3	10.1
Packaged software total	15.8	13.9	12.8	11.5	10.0	12.0
Services total	13.6	13.3	15.5	15.2	15.1	14.8
Total IT	10.2	12.0	12.2	11.7	11.1	11.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 299

PROPORTIONS OF IT SPENDING CATEGORIES IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.2	3.3	3.3	3.5	3.6	3.8
Implementation	12.9	13.3	13.5	13.8	14.1	14.5
Maintenance and support	6.7	6.8	6.8	6.8	7.0	7.2
Operations	1.7	1.8	1.9	2.1	2.3	2.5
IT training and education	1.7	1.7	1.8	1.8	1.9	2.0
Services total	26.2	27.0	27.3	28.1	29.0	30.0
Packaged software						
System infrastructure software	4.3	4.4	4.4	4.4	4.4	4.3
Appl. development and deployment	3.4	3.6	3.6	3.6	3.6	3.6
Applications	9.0	9.5	9.8	9.9	9.9	9.8
Packaged software total	16.6	17.5	17.8	17.9	17.8	17.7
Hardware						
Systems						
High-end enterprise servers	0.6	0.3	0.3	0.3	0.3	0.4
Midrange enterprise servers	1.7	1.7	1.6	1.5	1.5	1.4
Volume servers	4.8	4.6	4.7	4.7	4.6	4.5
Servers total	7.2	6.6	6.5	6.4	6.4	6.3
Personal computers	28.3	27.5	27.6	27.4	27.3	27.0
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	28.3	27.5	27.6	27.4	27.3	27.0
Systems total	35.6	34.3	34.2	34.0	33.7	33.3
Storage						
Disk systems	1.8	1.7	1.8	1.9	1.9	1.9
Tape automation	0.5	0.5	0.4	0.4	0.4	0.4
Storage total	2.3	2.2	2.3	2.3	2.3	2.3
Peripherals						
Printers and MFPs	8.0	7.7	7.4	7.0	6.5	6.1
Smart handheld devices	0.3	0.3	0.4	0.4	0.4	0.4
Other add-ons	3.4	3.4	3.4	3.4	3.4	3.3
Peripherals total	11.7	11.5	11.2	10.8	10.3	9.8
Networking equipment	7.6	7.5	7.2	7.0	6.9	6.9
Hardware total	57.2	55.5	55.0	54.1	53.2	52.3
Packaged software total	16.6	17.5	17.8	17.9	17.8	17.7
Services total	26.2	27.0	27.3	28.1	29.0	30.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 300

CENTRAL AND EASTERN EUROPE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.4	1.6	1.7	1.9	2.1	2.3
Implementation	1.5	1.7	1.9	2.1	2.2	2.4
Maintenance and support	1.2	1.3	1.3	1.4	1.5	1.6
Operations	0.4	0.5	0.5	0.6	0.7	0.7
IT training and education	1.2	1.4	1.6	1.8	2.0	2.2
Services total	1.2	1.3	1.4	1.6	1.7	1.8
Packaged software						
System infrastructure software	1.5	1.6	1.7	1.8	1.8	1.8
Appl. development and deployment	1.4	1.6	1.7	1.7	1.8	1.8
Applications	1.7	1.9	2.1	2.2	2.3	2.4
Packaged software total	1.6	1.7	1.9	2.0	2.0	2.1
Hardware						
Systems						
High-end enterprise servers	0.7	0.4	0.5	0.6	0.7	0.9
Midrange enterprise servers	1.9	2.2	2.2	2.3	2.4	2.4
Volume servers	3.6	3.7	3.8	4.0	4.1	4.2
Servers total	2.3	2.5	2.6	2.8	2.9	3.1
Personal computers	2.9	3.3	3.6	3.9	4.2	4.5
Traditional workstations	1.0	1.3	1.4	1.6	1.9	1.9
Clients total	2.9	3.3	3.6	3.9	4.2	4.5
Systems total	2.8	3.1	3.3	3.6	3.9	4.1
Storage						
Disk systems	1.3	1.5	1.7	1.9	2.1	2.2
Tape automation	2.8	2.9	2.9	2.9	2.9	2.8
Storage total	1.5	1.6	1.8	2.0	2.2	2.3
Peripherals						
Printers and MFPs	3.1	3.2	3.2	3.3	3.3	3.4
Smart handheld devices	0.6	0.5	0.4	0.4	0.3	0.3
Other add-ons	4.3	5.2	5.7	6.2	6.5	7.0
Peripherals total	3.1	3.1	3.0	2.9	2.8	2.7
Networking equipment	2.4	2.7	2.7	2.7	2.7	2.8
Hardware total	2.7	2.9	3.1	3.2	3.3	3.5
Packaged software total	1.6	1.7	1.9	2.0	2.0	2.1
Services total	1.2	1.3	1.4	1.6	1.7	1.8
Total IT	1.8	2.0	2.2	2.3	2.4	2.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 301

IT SPENDING IN BULGARIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.5	5.1	5.7	6.6	7.5	8.4
Implementation	31.7	35.8	40.6	45.9	51.8	58.3
Maintenance and support	11.1	12.4	13.9	15.7	17.6	19.8
Operations	2.8	3.1	3.4	3.8	4.1	4.7
IT training and education	1.2	1.3	1.5	1.7	1.9	2.1
Services total	51.2	57.7	65.1	73.6	82.8	93.3
Packaged software						
System infrastructure software	9.6	10.7	11.9	13.4	15.0	16.3
Appl. development and deployment	4.6	5.3	6.0	6.8	7.7	8.5
Applications	22.8	27.3	31.5	36.2	41.3	45.2
Packaged software total	37.0	43.3	49.4	56.4	64.0	70.1
Hardware						
Systems						
High-end enterprise servers	0.0	1.1	0.0	1.3	0.0	0.0
Midrange enterprise servers	3.3	4.5	5.4	5.2	6.1	5.6
Volume servers	11.8	12.9	15.0	15.3	17.5	19.3
Servers total	15.1	18.6	20.4	21.7	23.7	24.9
Personal computers	70.5	75.7	87.9	97.3	109.3	121.2
Traditional workstations	0.2	0.2	0.2	0.2	0.2	0.2
Clients total	70.8	75.9	88.1	97.5	109.4	121.4
Systems total	85.9	94.5	108.5	119.2	133.1	146.2
Storage						
Disk systems	4.2	4.6	5.0	5.5	6.4	7.1
Tape automation	1.9	1.9	1.8	2.0	2.0	2.0
Storage total	6.0	6.4	6.9	7.6	8.4	9.2
Peripherals						
Printers and MFPs	15.7	17.7	19.2	20.1	20.9	21.5
Smart handheld devices	1.4	1.7	1.9	2.2	2.5	2.8
Other add-ons	14.9	16.4	17.8	20.2	22.2	22.7
Peripherals total	31.9	35.8	38.8	42.5	45.5	47.0
Networking equipment	16.4	17.9	19.0	20.6	22.3	24.4
Hardware total	140.2	154.6	173.2	189.9	209.4	226.8
Packaged software total	37.0	43.3	49.4	56.4	64.0	70.1
Services total	51.2	57.7	65.1	73.6	82.8	93.3
Total IT	228.4	255.6	287.7	319.9	356.3	390.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 302

GROWTH IN IT SPENDING IN BULGARIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	14.0	11.6	14.4	13.8	12.6	13.1
Implementation	13.0	13.2	13.3	12.7	12.6	12.9
Maintenance and support	12.2	12.3	12.5	12.0	12.6	12.4
Operations	10.6	10.7	10.9	10.4	12.6	11.1
IT training and education	7.8	18.0	13.1	12.6	12.6	14.0
Services total	12.7	12.8	13.1	12.6	12.6	12.8
Packaged software						
System infrastructure software	11.5	11.2	12.6	11.9	8.8	11.1
Appl. development and deployment	15.2	13.2	13.3	13.2	10.6	12.6
Applications	19.7	15.4	14.9	14.1	9.5	13.5
Packaged software total	17.0	14.1	14.2	13.5	9.5	12.8
Hardware						
Systems						
High-end enterprise servers	NA	-100.0	NA	-100.0	NA	NA
Midrange enterprise servers	37.6	19.6	-4.9	19.2	-9.3	5.3
Volume servers	9.3	15.9	2.4	14.5	10.0	10.6
Servers total	23.0	9.7	6.6	8.9	5.0	7.6
Personal computers	7.3	16.1	10.7	12.3	10.9	12.5
Traditional workstations	-12.1	-11.4	-10.4	-5.9	-5.4	-8.3
Clients total	7.3	16.1	10.7	12.3	10.9	12.5
Systems total	10.0	14.8	9.9	11.7	9.8	11.5
Storage						
Disk systems	9.8	10.3	10.1	15.8	11.0	11.7
Tape automation	0.6	-2.5	10.4	0.7	0.0	2.0
Storage total	7.0	6.5	10.2	11.7	8.3	9.2
Peripherals						
Printers and MFPs	13.1	8.4	4.8	3.8	2.7	4.9
Smart handheld devices	24.4	11.3	16.6	12.8	14.2	13.7
Other add-ons	10.4	8.4	13.9	9.7	2.4	8.5
Peripherals total	12.4	8.5	9.5	7.0	3.2	7.0
Networking equipment	9.0	6.1	8.4	8.3	9.3	8.0
Hardware total	10.3	12.0	9.7	10.3	8.3	10.0
Packaged software total	17.0	14.1	14.2	13.5	9.5	12.8
Services total	12.7	12.8	13.1	12.6	12.6	12.8
Total IT	11.9	12.5	11.2	11.4	9.5	11.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 303

PROPORTIONS OF IT SPENDING CATEGORIES IN BULGARIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.0	2.0	2.0	2.0	2.1	2.2
Implementation	13.9	14.0	14.1	14.4	14.5	14.9
Maintenance and support	4.8	4.9	4.8	4.9	4.9	5.1
Operations	1.2	1.2	1.2	1.2	1.2	1.2
IT training and education	0.5	0.5	0.5	0.5	0.5	0.5
Services total	22.4	22.6	22.6	23.0	23.3	23.9
Packaged software						
System infrastructure software	4.2	4.2	4.1	4.2	4.2	4.2
Appl. development and deployment	2.0	2.1	2.1	2.1	2.2	2.2
Applications	10.0	10.7	10.9	11.3	11.6	11.6
Packaged software total	16.2	16.9	17.2	17.6	18.0	18.0
Hardware						
Systems						
High-end enterprise servers	0.0	0.4	0.0	0.4	0.0	0.0
Midrange enterprise servers	1.4	1.8	1.9	1.6	1.7	1.4
Volume servers	5.2	5.1	5.2	4.8	4.9	4.9
Servers total	6.6	7.3	7.1	6.8	6.7	6.4
Personal computers	30.9	29.6	30.6	30.4	30.7	31.1
Traditional workstations	0.1	0.1	0.1	0.1	0.0	0.0
Clients total	30.9	29.6	30.6	30.4	30.7	31.1
Systems total	37.6	37.0	37.7	37.3	37.4	37.5
Storage						
Disk systems	1.8	1.8	1.7	1.7	1.8	1.8
Tape automation	0.8	0.7	0.6	0.6	0.6	0.5
Storage total	2.6	2.5	2.4	2.4	2.4	2.3
Peripherals						
Printers and MFPs	6.9	6.9	6.7	6.3	5.9	5.5
Smart handheld devices	0.6	0.7	0.6	0.7	0.7	0.7
Other add-ons	6.5	6.4	6.2	6.3	6.2	5.8
Peripherals total	13.9	14.0	13.5	13.3	12.8	12.0
Networking equipment	7.2	7.0	6.6	6.4	6.3	6.2
Hardware total	61.4	60.5	60.2	59.4	58.8	58.1
Packaged software total	16.2	16.9	17.2	17.6	18.0	18.0
Services total	22.4	22.6	22.6	23.0	23.3	23.9
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 304

BULGARIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.9	0.9	0.9	0.8	0.8	0.8
Implementation	1.5	1.5	1.5	1.5	1.5	1.5
Maintenance and support	1.0	1.0	1.0	1.0	1.0	1.0
Operations	1.0	1.0	0.9	0.8	0.7	0.7
IT training and education	0.4	0.4	0.4	0.4	0.4	0.4
Services total	1.2	1.2	1.2	1.2	1.2	1.1
Packaged software						
System infrastructure software	1.4	1.4	1.4	1.4	1.4	1.4
Appl. development and deployment	0.8	0.8	0.8	0.9	0.9	0.9
Applications	1.6	1.6	1.6	1.7	1.7	1.7
Packaged software total	1.4	1.4	1.4	1.4	1.5	1.4
Hardware						
Systems						
High-end enterprise servers	0.0	2.2	0.0	2.0	0.0	0.0
Midrange enterprise servers	1.2	1.5	1.8	1.5	1.7	1.5
Volume servers	1.5	1.6	1.6	1.5	1.5	1.6
Servers total	1.3	1.6	1.6	1.5	1.5	1.5
Personal computers	1.6	1.6	1.6	1.6	1.6	1.6
Traditional workstations	1.0	1.0	1.0	1.0	0.9	1.0
Clients total	1.6	1.6	1.6	1.6	1.6	1.6
Systems total	1.5	1.6	1.6	1.6	1.6	1.6
Storage						
Disk systems	1.5	1.5	1.4	1.3	1.4	1.3
Tape automation	2.3	2.2	2.1	2.2	2.1	2.0
Storage total	1.7	1.6	1.5	1.5	1.5	1.5
Peripherals						
Printers and MFPs	1.2	1.3	1.3	1.3	1.3	1.3
Smart handheld devices	2.8	2.8	2.5	2.6	2.6	2.6
Other add-ons	2.7	2.7	2.7	2.7	2.7	2.5
Peripherals total	1.7	1.8	1.8	1.8	1.8	1.7
Networking equipment	1.4	1.4	1.3	1.3	1.3	1.3
Hardware total	1.5	1.6	1.6	1.6	1.6	1.6
Packaged software total	1.4	1.4	1.4	1.4	1.5	1.4
Services total	1.2	1.2	1.2	1.2	1.2	1.1
Total IT	1.4	1.5	1.5	1.4	1.4	1.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 305

BULGARIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.0	0.0	0.0
Implementation	0.0	0.0	0.0	0.0	0.0	0.0
Maintenance and support	0.0	0.0	0.0	0.0	0.0	0.0
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software						
System infrastructure software	0.0	0.0	0.0	0.0	0.0	0.0
Appl. development and deployment	0.0	0.0	0.0	0.0	0.0	0.0
Applications	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Volume servers	0.1	0.1	0.1	0.1	0.1	0.1
Servers total	0.0	0.0	0.0	0.0	0.0	0.0
Personal computers	0.0	0.1	0.1	0.1	0.1	0.1
Traditional workstations	0.0	0.0	0.0	0.0	0.0	0.0
Clients total	0.0	0.1	0.1	0.1	0.1	0.1
Systems total	0.0	0.0	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.0	0.0	0.0	0.0	0.0	0.0
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.0	0.0	0.0	0.0
Peripherals						
Printers and MFPs	0.0	0.0	0.0	0.0	0.0	0.0
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.1	0.1	0.2	0.2	0.2	0.2
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.0
Networking equipment	0.0	0.0	0.0	0.0	0.0	0.0
Hardware total	0.0	0.0	0.0	0.1	0.1	0.1
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Total IT	0.0	0.0	0.0	0.0	0.0	0.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 306

IT SPENDING IN CROATIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	13.0	15.0	17.8	20.7	23.8	26.6
Implementation	51.5	60.0	70.6	81.3	92.3	103.5
Maintenance and support	32.9	37.8	42.8	48.0	52.3	58.7
Operations	1.2	1.6	2.1	2.7	3.4	3.9
IT training and education	8.2	9.5	10.6	11.6	12.6	14.1
Services total	106.8	123.9	143.9	164.3	184.3	206.8
Packaged software						
System infrastructure software	23.7	26.1	28.7	31.6	34.8	39.3
Appl. development and deployment	18.4	20.5	22.6	25.1	27.8	31.1
Applications	45.3	52.5	59.4	66.6	74.4	83.4
Packaged software total	87.4	99.1	110.8	123.4	137.0	153.9
Hardware						
Systems						
High-end enterprise servers	2.1	1.2	2.5	3.6	2.4	3.6
Midrange enterprise servers	16.7	15.7	15.7	19.3	20.9	20.4
Volume servers	23.8	28.7	31.7	35.2	40.1	45.8
Servers total	42.7	45.7	49.8	58.2	63.4	69.8
Personal computers	140.0	150.3	150.4	156.1	166.4	181.3
Traditional workstations	0.6	0.5	0.4	0.4	0.3	0.3
Clients total	140.6	150.8	150.8	156.5	166.8	181.6
Systems total	183.3	196.5	200.6	214.7	230.2	251.3
Storage						
Disk systems	9.4	9.5	10.5	12.1	13.7	15.0
Tape automation	2.7	2.5	2.8	2.9	3.2	3.2
Storage total	12.1	12.0	13.3	15.0	16.9	18.2
Peripherals						
Printers and MFPs	31.5	32.9	34.8	35.5	36.0	37.1
Smart handheld devices	1.8	2.0	2.3	2.7	2.9	3.5
Other add-ons	16.6	18.5	20.5	22.7	25.0	28.3
Peripherals total	49.9	53.4	57.7	60.8	63.9	68.8
Networking equipment	23.2	25.8	29.1	32.0	35.2	39.4
Hardware total	268.5	287.7	300.7	322.5	346.2	377.8
Packaged software total	87.4	99.1	110.8	123.4	137.0	153.9
Services total	106.8	123.9	143.9	164.3	184.3	206.8
Total IT	462.8	510.7	555.3	610.1	667.5	738.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 307

GROWTH IN IT SPENDING IN CROATIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	15.3	19.1	16.0	14.9	12.2	15.5
Implementation	16.6	17.6	15.2	13.5	12.2	14.6
Maintenance and support	14.7	13.3	12.1	9.0	12.2	11.6
Operations	36.8	27.3	28.7	27.2	12.2	23.7
IT training and education	15.5	11.3	9.1	8.5	12.2	10.3
Services total	16.0	16.1	14.1	12.2	12.2	13.7
Packaged software						
System infrastructure software	10.1	10.0	10.2	10.0	13.0	10.8
Appl. development and deployment	11.1	10.6	11.1	10.7	12.0	11.1
Applications	15.9	13.1	12.1	11.7	12.1	12.3
Packaged software total	13.3	11.8	11.4	11.1	12.3	11.6
Hardware						
Systems						
High-end enterprise servers	-41.6	98.0	48.5	-34.0	48.5	30.3
Midrange enterprise servers	-6.0	-0.4	23.4	8.0	-2.3	6.7
Volume servers	20.6	10.5	11.0	14.0	14.1	12.4
Servers total	7.1	9.1	16.7	9.0	10.0	11.2
Personal computers	7.3	0.0	3.9	6.6	8.9	4.8
Traditional workstations	-14.7	-16.4	-17.0	-9.7	-5.2	-12.2
Clients total	7.3	0.0	3.9	6.6	8.9	4.8
Systems total	7.2	2.1	7.0	7.2	9.2	6.3
Storage						
Disk systems	0.9	10.2	16.0	12.9	9.7	12.2
Tape automation	-7.4	12.0	2.4	11.1	0.0	6.2
Storage total	-0.9	10.6	13.1	12.6	7.9	11.0
Peripherals						
Printers and MFPs	4.5	5.8	1.8	1.6	2.8	3.0
Smart handheld devices	12.2	12.8	16.6	10.1	17.3	14.2
Other add-ons	11.3	11.0	10.4	10.1	13.5	11.2
Peripherals total	7.0	7.9	5.5	5.1	7.7	6.5
Networking equipment	11.2	13.0	9.8	10.0	11.9	11.2
Hardware total	7.1	4.5	7.2	7.4	9.1	7.0
Packaged software total	13.3	11.8	11.4	11.1	12.3	11.6
Services total	16.0	16.1	14.1	12.2	12.2	13.7
Total IT	10.4	8.7	9.9	9.4	10.6	9.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 308

PROPORTIONS OF IT SPENDING CATEGORIES IN CROATIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.8	2.9	3.2	3.4	3.6	3.6
Implementation	11.1	11.8	12.7	13.3	13.8	14.0
Maintenance and support	7.1	7.4	7.7	7.9	7.8	7.9
Operations	0.3	0.3	0.4	0.4	0.5	0.5
IT training and education	1.8	1.9	1.9	1.9	1.9	1.9
Services total	23.1	24.3	25.9	26.9	27.6	28.0
Packaged software						
System infrastructure software	5.1	5.1	5.2	5.2	5.2	5.3
Appl. development and deployment	4.0	4.0	4.1	4.1	4.2	4.2
Applications	9.8	10.3	10.7	10.9	11.1	11.3
Packaged software total	18.9	19.4	19.9	20.2	20.5	20.8
Hardware						
Systems						
High-end enterprise servers	0.5	0.2	0.4	0.6	0.4	0.5
Midrange enterprise servers	3.6	3.1	2.8	3.2	3.1	2.8
Volume servers	5.1	5.6	5.7	5.8	6.0	6.2
Servers total	9.2	8.9	9.0	9.5	9.5	9.4
Personal computers	30.3	29.4	27.1	25.6	24.9	24.5
Traditional workstations	0.1	0.1	0.1	0.1	0.0	0.0
Clients total	30.3	29.4	27.1	25.6	24.9	24.5
Systems total	39.6	38.5	36.1	35.2	34.5	34.0
Storage						
Disk systems	2.0	1.9	1.9	2.0	2.1	2.0
Tape automation	0.6	0.5	0.5	0.5	0.5	0.4
Storage total	2.6	2.3	2.4	2.5	2.5	2.5
Peripherals						
Printers and MFPs	6.8	6.4	6.3	5.8	5.4	5.0
Smart handheld devices	0.4	0.4	0.4	0.4	0.4	0.5
Other add-ons	3.6	3.6	3.7	3.7	3.7	3.8
Peripherals total	10.8	10.5	10.4	10.0	9.6	9.3
Networking equipment	5.0	5.1	5.2	5.2	5.3	5.3
Hardware total	58.0	56.3	54.1	52.9	51.9	51.2
Packaged software total	18.9	19.4	19.9	20.2	20.5	20.8
Services total	23.1	24.3	25.9	26.9	27.6	28.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 309

CROATIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.5	2.6	2.7	2.7	2.7	2.6
Implementation	2.5	2.6	2.7	2.7	2.7	2.6
Maintenance and support	3.1	3.2	3.2	3.2	3.0	3.0
Operations	0.5	0.5	0.6	0.6	0.6	0.6
IT training and education	3.1	3.1	3.1	2.9	2.6	2.6
Services total	2.6	2.6	2.7	2.7	2.6	2.5
Packaged software						
System infrastructure software	3.5	3.4	3.3	3.2	3.2	3.4
Appl. development and deployment	3.4	3.3	3.2	3.2	3.1	3.2
Applications	3.2	3.1	3.1	3.1	3.1	3.1
Packaged software total	3.3	3.2	3.2	3.1	3.1	3.2
Hardware						
Systems						
High-end enterprise servers	2.1	2.4	4.5	5.9	3.3	3.6
Midrange enterprise servers	6.0	5.2	5.1	5.8	5.8	5.4
Volume servers	3.1	3.5	3.4	3.4	3.5	3.7
Servers total	3.7	3.9	3.9	4.1	4.0	4.1
Personal computers	3.1	3.1	2.8	2.6	2.5	2.5
Traditional workstations	2.5	2.4	2.3	2.1	1.9	2.0
Clients total	3.1	3.1	2.8	2.6	2.5	2.4
Systems total	3.2	3.3	3.0	2.9	2.8	2.8
Storage						
Disk systems	3.4	3.1	2.9	2.9	2.9	2.8
Tape automation	3.3	2.9	3.2	3.1	3.3	3.2
Storage total	3.3	3.1	3.0	3.0	3.0	2.9
Peripherals						
Printers and MFPs	2.5	2.4	2.4	2.3	2.2	2.2
Smart handheld devices	3.7	3.4	3.1	3.2	3.1	3.2
Other add-ons	3.1	3.1	3.1	3.1	3.0	3.1
Peripherals total	2.7	2.6	2.6	2.6	2.5	2.6
Networking equipment	1.9	2.0	2.0	2.1	2.1	2.1
Hardware total	2.9	2.9	2.8	2.7	2.6	2.6
Packaged software total	3.3	3.2	3.2	3.1	3.1	3.2
Services total	2.6	2.6	2.7	2.7	2.6	2.5
Total IT	2.9	2.9	2.8	2.8	2.7	2.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 310

CROATIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.1	0.1	0.1
Implementation	0.0	0.0	0.1	0.1	0.1	0.1
Maintenance and support	0.0	0.0	0.0	0.0	0.0	0.0
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.1	0.1	0.1
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.0	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.1	0.1	0.1	0.1	0.1	0.2
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.1
Traditional workstations	0.0	0.0	0.0	0.0	0.0	0.0
Clients total	0.1	0.1	0.1	0.1	0.1	0.1
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.0	0.0	0.0	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.1	0.2	0.2	0.2	0.2	0.2
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.0	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 311

IT SPENDING IN THE CZECH REPUBLIC, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	90.8	98.9	107.5	118.1	129.5	141.8
Implementation	385.4	420.5	458.8	506.5	560.2	619.1
Maintenance and support	202.3	217.5	235.7	257.5	282.4	311.6
Operations	52.3	61.0	72.9	92.1	114.8	143.5
IT training and education	37.1	42.0	47.5	54.6	62.8	72.2
Services total	767.9	840.0	922.5	1,028.7	1,149.7	1,288.3
Packaged software						
System infrastructure software	134.1	151.3	169.8	190.7	213.0	234.2
Appl. development and deployment	80.5	91.6	104.2	118.1	132.4	146.4
Applications	203.5	233.8	268.1	305.6	346.7	376.4
Packaged software total	418.1	476.7	542.1	614.4	692.1	757.0
Hardware						
Systems						
High-end enterprise servers	13.3	6.6	5.2	2.6	3.8	6.3
Midrange enterprise servers	55.2	56.9	56.2	57.2	59.8	60.9
Volume servers	84.6	80.0	87.5	100.8	107.7	113.2
Servers total	153.1	143.4	148.8	160.6	171.3	180.4
Personal computers	396.2	393.5	398.2	437.8	468.1	490.3
Traditional workstations	5.9	5.8	5.2	5.3	6.2	4.9
Clients total	402.1	399.3	403.4	443.2	474.3	495.2
Systems total	555.2	542.8	552.3	603.8	645.6	675.6
Storage						
Disk systems	50.0	51.3	57.9	65.2	65.4	69.4
Tape automation	12.1	12.3	12.0	12.5	12.7	12.7
Storage total	62.1	63.6	69.9	77.7	78.1	82.1
Peripherals						
Printers and MFPs	109.8	114.5	118.8	123.8	129.4	132.9
Smart handheld devices	8.4	10.2	12.4	13.3	15.3	16.9
Other add-ons	77.6	83.9	91.7	100.1	109.7	119.3
Peripherals total	195.8	208.6	222.9	237.3	254.4	269.1
Networking equipment	175.1	186.3	196.5	211.3	229.6	253.5
Hardware total	988.2	1,001.3	1,041.5	1,130.1	1,207.7	1,280.3
Packaged software total	418.1	476.7	542.1	614.4	692.1	757.0
Services total	767.9	840.0	922.5	1,028.7	1,149.7	1,288.3
Total IT	2,174.1	2,318.0	2,506.1	2,773.1	3,049.5	3,325.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 312

GROWTH IN IT SPENDING IN THE CZECH REPUBLIC, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	8.9	8.7	9.8	9.7	9.6	9.4
Implementation	9.1	9.1	10.4	10.6	10.5	10.2
Maintenance and support	7.5	8.3	9.3	9.7	10.4	9.4
Operations	16.6	19.5	26.3	24.7	25.0	23.8
IT training and education	13.2	13.2	14.9	14.9	15.0	14.5
Services total	9.4	9.8	11.5	11.8	12.1	11.3
Packaged software						
System infrastructure software	12.8	12.2	12.3	11.7	10.0	11.5
Appl. development and deployment	13.9	13.7	13.3	12.1	10.6	12.4
Applications	14.9	14.7	14.0	13.4	8.6	12.6
Packaged software total	14.0	13.7	13.3	12.7	9.4	12.3
Hardware						
Systems						
High-end enterprise servers	-50.5	-20.8	-50.5	48.5	65.0	-1.0
Midrange enterprise servers	3.1	-1.3	1.8	4.5	1.9	1.7
Volume servers	-5.5	9.4	15.3	6.8	5.1	9.1
Servers total	-6.3	3.8	7.9	6.7	5.3	5.9
Personal computers	-0.7	1.2	10.0	6.9	4.7	5.7
Traditional workstations	-0.3	-10.3	1.9	16.8	-21.1	-4.2
Clients total	-0.7	1.2	10.0	6.9	4.7	5.7
Systems total	-2.2	1.7	9.3	6.9	4.6	5.6
Storage						
Disk systems	2.5	13.0	12.6	0.3	6.1	7.9
Tape automation	1.7	-2.4	4.2	1.6	0.0	0.8
Storage total	2.3	10.0	11.2	0.5	5.1	6.6
Peripherals						
Printers and MFPs	4.3	3.7	4.2	4.5	2.7	3.8
Smart handheld devices	21.5	21.6	7.5	15.0	10.3	13.5
Other add-ons	8.1	9.3	9.2	9.6	8.8	9.2
Peripherals total	6.6	6.9	6.5	7.2	5.8	6.6
Networking equipment	6.4	5.4	7.6	8.7	10.4	8.0
Hardware total	1.3	4.0	8.5	6.9	6.0	6.3
Packaged software total	14.0	13.7	13.3	12.7	9.4	12.3
Services total	9.4	9.8	11.5	11.8	12.1	11.3
Total IT	6.6	8.1	10.7	10.0	9.1	9.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 313

PROPORTIONS OF IT SPENDING CATEGORIES IN THE CZECH REPUBLIC, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.2	4.3	4.3	4.3	4.2	4.3
Implementation	17.7	18.1	18.3	18.3	18.4	18.6
Maintenance and support	9.3	9.4	9.4	9.3	9.3	9.4
Operations	2.4	2.6	2.9	3.3	3.8	4.3
IT training and education	1.7	1.8	1.9	2.0	2.1	2.2
Services total	35.3	36.2	36.8	37.1	37.7	38.7
Packaged software						
System infrastructure software	6.2	6.5	6.8	6.9	7.0	7.0
Appl. development and deployment	3.7	4.0	4.2	4.3	4.3	4.4
Applications	9.4	10.1	10.7	11.0	11.4	11.3
Packaged software total	19.2	20.6	21.6	22.2	22.7	22.8
Hardware						
Systems						
High-end enterprise servers	0.6	0.3	0.2	0.1	0.1	0.2
Midrange enterprise servers	2.5	2.5	2.2	2.1	2.0	1.8
Volume servers	3.9	3.5	3.5	3.6	3.5	3.4
Servers total	7.0	6.2	5.9	5.8	5.6	5.4
Personal computers	18.2	17.0	15.9	15.8	15.3	14.7
Traditional workstations	0.3	0.3	0.2	0.2	0.2	0.1
Clients total	18.2	17.0	15.9	15.8	15.3	14.7
Systems total	25.5	23.4	22.0	21.8	21.2	20.3
Storage						
Disk systems	2.3	2.2	2.3	2.4	2.1	2.1
Tape automation	0.6	0.5	0.5	0.5	0.4	0.4
Storage total	2.9	2.7	2.8	2.8	2.6	2.5
Peripherals						
Printers and MFPs	5.0	4.9	4.7	4.5	4.2	4.0
Smart handheld devices	0.4	0.4	0.5	0.5	0.5	0.5
Other add-ons	3.6	3.6	3.7	3.6	3.6	3.6
Peripherals total	9.0	9.0	8.9	8.6	8.3	8.1
Networking equipment	8.1	8.0	7.8	7.6	7.5	7.6
Hardware total	45.5	43.2	41.6	40.8	39.6	38.5
Packaged software total	19.2	20.6	21.6	22.2	22.7	22.8
Services total	35.3	36.2	36.8	37.1	37.7	38.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 314

CZECH REPUBLIC PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	17.7	17.0	16.3	15.2	14.5	13.7
Implementation	18.8	18.0	17.3	16.7	16.1	15.6
Maintenance and support	18.9	18.2	17.7	17.1	16.5	15.9
Operations	19.8	19.2	19.3	19.6	20.0	20.9
IT training and education	13.9	13.7	13.7	13.6	13.2	13.1
Services total	18.4	17.7	17.2	16.6	16.1	15.7
Packaged software						
System infrastructure software	19.8	19.6	19.5	19.5	19.7	20.0
Appl. development and deployment	14.8	14.7	14.7	14.9	15.0	15.0
Applications	14.2	14.0	13.9	14.0	14.2	14.0
Packaged software total	15.8	15.5	15.5	15.6	15.7	15.6
Hardware						
Systems						
High-end enterprise servers	13.3	12.7	9.5	4.2	5.2	6.3
Midrange enterprise servers	19.9	18.9	18.3	17.1	16.7	16.2
Volume servers	11.0	9.8	9.5	9.8	9.5	9.1
Servers total	13.4	12.3	11.6	11.3	10.9	10.5
Personal computers	8.8	8.1	7.3	7.2	7.0	6.6
Traditional workstations	24.8	27.8	28.5	31.7	37.2	33.1
Clients total	8.9	8.2	7.4	7.3	7.0	6.7
Systems total	9.8	9.0	8.2	8.1	7.8	7.4
Storage						
Disk systems	17.9	16.7	16.1	15.8	13.8	13.1
Tape automation	14.6	14.3	13.8	13.5	13.1	12.6
Storage total	17.1	16.2	15.7	15.4	13.7	13.1
Peripherals						
Printers and MFPs	8.6	8.4	8.1	8.0	8.0	7.9
Smart handheld devices	17.4	17.0	16.7	15.9	16.3	15.9
Other add-ons	14.3	13.9	13.7	13.5	13.2	13.0
Peripherals total	10.5	10.3	10.1	10.0	10.0	10.0
Networking equipment	14.5	14.2	13.8	13.6	13.5	13.4
Hardware total	10.8	10.3	9.6	9.5	9.2	8.9
Packaged software total	15.8	15.5	15.5	15.6	15.7	15.6
Services total	18.4	17.7	17.2	16.6	16.1	15.7
Total IT	13.6	13.2	12.7	12.6	12.4	12.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 315

CZECH REPUBLIC PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.3	0.3	0.3	0.3	0.3
Implementation	0.3	0.3	0.3	0.3	0.4	0.4
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.3
Operations	0.1	0.1	0.1	0.1	0.1	0.2
IT training and education	0.2	0.2	0.2	0.2	0.3	0.3
Services total	0.2	0.2	0.2	0.3	0.3	0.3
Packaged software						
System infrastructure software	0.3	0.3	0.3	0.3	0.4	0.4
Appl. development and deployment	0.2	0.2	0.2	0.3	0.3	0.3
Applications	0.2	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.3	0.3	0.3	0.3	0.3
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.0	0.0	0.0	0.1
Midrange enterprise servers	0.4	0.4	0.4	0.4	0.4	0.4
Volume servers	0.4	0.4	0.4	0.4	0.4	0.4
Servers total	0.3	0.3	0.3	0.3	0.3	0.3
Personal computers	0.3	0.3	0.3	0.3	0.3	0.3
Traditional workstations	0.2	0.3	0.4	0.5	0.7	0.6
Clients total	0.3	0.3	0.3	0.3	0.3	0.3
Systems total	0.3	0.3	0.3	0.3	0.3	0.3
Storage						
Disk systems	0.2	0.2	0.3	0.3	0.3	0.3
Tape automation	0.4	0.4	0.4	0.4	0.4	0.4
Storage total	0.3	0.3	0.3	0.3	0.3	0.3
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.0
Other add-ons	0.6	0.7	0.8	0.8	0.9	0.9
Peripherals total	0.3	0.3	0.3	0.3	0.3	0.3
Networking equipment	0.3	0.4	0.4	0.4	0.4	0.4
Hardware total	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.3	0.3	0.3	0.3	0.3
Services total	0.2	0.2	0.2	0.3	0.3	0.3
Total IT	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 316

IT SPENDING IN HUNGARY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	67.7	71.5	78.7	86.2	95.6	106.7
Implementation	244.8	261.3	289.9	319.7	354.2	395.5
Maintenance and support	132.0	139.4	152.7	167.2	183.0	204.3
Operations	47.0	55.3	67.4	80.8	97.2	108.5
IT training and education	37.6	39.5	43.3	47.1	52.0	58.0
Services total	529.0	567.0	632.0	701.0	782.0	873.0
Packaged software						
System infrastructure software	101.3	112.3	123.2	134.2	145.2	157.2
Appl. development and deployment	83.6	92.4	101.3	110.9	124.2	135.2
Applications	183.9	210.2	234.8	262.7	289.4	323.4
Packaged software total	368.8	414.9	459.3	507.8	558.8	615.8
Hardware						
Systems						
High-end enterprise servers	3.5	2.3	4.6	3.4	1.1	2.2
Midrange enterprise servers	34.4	36.0	37.5	37.8	37.0	38.1
Volume servers	61.9	64.1	70.4	75.1	81.5	86.8
Servers total	99.8	102.4	112.5	116.3	119.6	127.1
Personal computers	269.8	301.6	346.8	380.9	400.2	415.9
Traditional workstations	1.3	1.4	1.3	1.3	1.3	1.2
Clients total	271.2	303.0	348.1	382.2	401.4	417.1
Systems total	371.0	405.4	460.5	498.5	521.0	544.3
Storage						
Disk systems	42.2	44.1	47.3	52.3	58.2	61.1
Tape automation	7.2	7.4	8.2	8.1	8.3	8.2
Storage total	49.4	51.5	55.5	60.4	66.5	69.3
Peripherals						
Printers and MFPs	81.0	86.7	89.2	92.2	95.0	96.2
Smart handheld devices	4.1	5.2	6.7	8.2	9.6	10.5
Other add-ons	59.5	64.9	70.3	75.7	81.8	88.0
Peripherals total	144.7	156.8	166.3	176.1	186.4	194.8
Networking equipment	97.2	106.6	117.4	128.5	141.8	155.3
Hardware total	662.3	720.4	799.8	863.5	915.7	963.6
Packaged software total	368.8	414.9	459.3	507.8	558.8	615.8
Services total	529.0	567.0	632.0	701.0	782.0	873.0
Total IT	1,560.1	1,702.3	1,891.0	2,072.3	2,256.5	2,452.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 317

GROWTH IN IT SPENDING IN HUNGARY, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	5.7	10.1	9.6	10.8	11.6	10.5
Implementation	6.8	10.9	10.3	10.8	11.6	10.9
Maintenance and support	5.6	9.6	9.4	9.5	11.6	10.0
Operations	17.7	21.8	19.9	20.3	11.6	18.3
IT training and education	5.1	9.7	8.7	10.4	11.6	10.1
Services total	7.2	11.5	10.9	11.6	11.6	11.4
Packaged software						
System infrastructure software	10.9	9.7	8.9	8.2	8.3	8.8
Appl. development and deployment	10.5	9.6	9.5	12.0	8.9	10.0
Applications	14.3	11.7	11.9	10.2	11.7	11.4
Packaged software total	12.5	10.7	10.6	10.0	10.2	10.4
Hardware						
Systems						
High-end enterprise servers	-34.0	98.0	-25.8	-67.0	97.0	-1.1
Midrange enterprise servers	4.5	4.1	0.9	-2.0	3.0	1.5
Volume servers	3.6	9.8	6.7	8.5	6.5	7.9
Servers total	2.6	9.9	3.4	2.9	6.3	5.6
Personal computers	11.8	15.0	9.8	5.1	3.9	8.4
Traditional workstations	3.7	-9.8	1.9	-2.0	-2.4	-3.2
Clients total	11.8	15.0	9.8	5.1	3.9	8.4
Systems total	9.3	13.6	8.2	4.5	4.5	7.6
Storage						
Disk systems	4.5	7.1	10.6	11.3	4.9	8.4
Tape automation	2.8	10.8	-1.2	2.5	-1.2	2.6
Storage total	4.2	7.7	8.8	10.1	4.2	7.7
Peripherals						
Printers and MFPs	7.0	2.9	3.3	3.1	1.2	2.6
Smart handheld devices	25.4	29.7	21.7	16.8	10.1	19.4
Other add-ons	9.1	8.4	7.6	8.0	7.6	7.9
Peripherals total	8.4	6.1	5.9	5.8	4.5	5.6
Networking equipment	9.7	10.1	9.5	10.4	9.5	9.9
Hardware total	8.8	11.0	8.0	6.1	5.2	7.5
Packaged software total	12.5	10.7	10.6	10.0	10.2	10.4
Services total	7.2	11.5	10.9	11.6	11.6	11.4
Total IT	9.1	11.1	9.6	8.9	8.7	9.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 318

PROPORTIONS OF IT SPENDING CATEGORIES IN HUNGARY, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.2	4.2	4.2	4.2	4.4
Implementation	15.7	15.4	15.3	15.4	15.7	16.1
Maintenance and support	8.5	8.2	8.1	8.1	8.1	8.3
Operations	3.0	3.3	3.6	3.9	4.3	4.4
IT training and education	2.4	2.3	2.3	2.3	2.3	2.4
Services total	33.9	33.3	33.4	33.8	34.7	35.6
Packaged software						
System infrastructure software	6.5	6.6	6.5	6.5	6.4	6.4
Appl. development and deployment	5.4	5.4	5.4	5.4	5.5	5.5
Applications	11.8	12.3	12.4	12.7	12.8	13.2
Packaged software total	23.6	24.4	24.3	24.5	24.8	25.1
Hardware						
Systems						
High-end enterprise servers	0.2	0.1	0.2	0.2	0.1	0.1
Midrange enterprise servers	2.2	2.1	2.0	1.8	1.6	1.6
Volume servers	4.0	3.8	3.7	3.6	3.6	3.5
Servers total	6.4	6.0	5.9	5.6	5.3	5.2
Personal computers	17.3	17.7	18.3	18.4	17.7	17.0
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.1
Clients total	17.3	17.7	18.3	18.4	17.7	17.0
Systems total	23.8	23.8	24.4	24.1	23.1	22.2
Storage						
Disk systems	2.7	2.6	2.5	2.5	2.6	2.5
Tape automation	0.5	0.4	0.4	0.4	0.4	0.3
Storage total	3.2	3.0	2.9	2.9	2.9	2.8
Peripherals						
Printers and MFPs	5.2	5.1	4.7	4.4	4.2	3.9
Smart handheld devices	0.3	0.3	0.4	0.4	0.4	0.4
Other add-ons	3.8	3.8	3.7	3.7	3.6	3.6
Peripherals total	9.3	9.2	8.8	8.5	8.3	7.9
Networking equipment	6.2	6.3	6.2	6.2	6.3	6.3
Hardware total	42.4	42.3	42.3	41.7	40.6	39.3
Packaged software total	23.6	24.4	24.3	24.5	24.8	25.1
Services total	33.9	33.3	33.4	33.8	34.7	35.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 319

HUNGARY PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	13.2	12.3	12.0	11.1	10.7	10.3
Implementation	11.9	11.2	10.9	10.5	10.2	9.9
Maintenance and support	12.3	11.7	11.5	11.1	10.7	10.4
Operations	17.8	17.4	17.9	17.2	16.9	15.8
IT training and education	14.1	12.9	12.5	11.8	10.9	10.6
Services total	12.7	12.0	11.8	11.3	11.0	10.6
Packaged software						
System infrastructure software	14.9	14.5	14.2	13.8	13.5	13.4
Appl. development and deployment	15.4	14.8	14.3	14.0	14.1	13.9
Applications	12.9	12.5	12.2	12.1	11.9	12.0
Packaged software total	13.9	13.5	13.1	12.9	12.7	12.7
Hardware						
Systems						
High-end enterprise servers	3.5	4.5	8.4	5.5	1.5	2.2
Midrange enterprise servers	12.4	12.0	12.2	11.3	10.3	10.2
Volume servers	8.1	7.9	7.6	7.3	7.2	7.0
Servers total	8.7	8.8	8.8	8.2	7.6	7.4
Personal computers	6.0	6.2	6.4	6.3	5.9	5.6
Traditional workstations	5.7	6.7	6.9	7.6	7.5	8.3
Clients total	6.0	6.2	6.4	6.3	5.9	5.6
Systems total	6.5	6.7	6.8	6.7	6.3	6.0
Storage						
Disk systems	15.1	14.4	13.2	12.7	12.3	11.6
Tape automation	8.7	8.6	9.4	8.7	8.5	8.2
Storage total	13.6	13.1	12.4	11.9	11.6	11.0
Peripherals						
Printers and MFPs	6.3	6.4	6.1	5.9	5.9	5.8
Smart handheld devices	8.6	8.6	9.1	9.8	10.2	9.9
Other add-ons	11.0	10.7	10.5	10.2	9.8	9.6
Peripherals total	7.7	7.7	7.5	7.4	7.4	7.2
Networking equipment	8.1	8.1	8.2	8.3	8.4	8.2
Hardware total	7.3	7.4	7.4	7.2	7.0	6.7
Packaged software total	13.9	13.5	13.1	12.9	12.7	12.7
Services total	12.7	12.0	11.8	11.3	11.0	10.6
Total IT	9.8	9.7	9.6	9.4	9.2	9.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 320

HUNGARY PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.2	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.1	0.1	0.2	0.2	0.2	0.2
Operations	0.1	0.1	0.1	0.1	0.1	0.1
IT training and education	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.3	0.3
Applications	0.2	0.2	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.2	0.2	0.3	0.3	0.3
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.2	0.3	0.3	0.3	0.3	0.2
Volume servers	0.3	0.3	0.3	0.3	0.3	0.3
Servers total	0.2	0.2	0.2	0.2	0.2	0.2
Personal computers	0.2	0.2	0.2	0.2	0.2	0.3
Traditional workstations	0.1	0.1	0.1	0.1	0.1	0.2
Clients total	0.2	0.2	0.2	0.2	0.2	0.3
Systems total	0.2	0.2	0.2	0.2	0.2	0.2
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.3	0.3
Tape automation	0.2	0.3	0.3	0.3	0.2	0.2
Storage total	0.2	0.2	0.2	0.2	0.3	0.3
Peripherals						
Printers and MFPs	0.2	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.1	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.5	0.6	0.6	0.6	0.6	0.7
Peripherals total	0.2	0.2	0.2	0.2	0.2	0.2
Networking equipment	0.2	0.2	0.2	0.2	0.2	0.2
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.2	0.2	0.2	0.3	0.3	0.3
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 321

IT SPENDING IN POLAND, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	82.3	91.8	103.1	115.6	129.4	143.9
Implementation	375.2	422.6	478.8	538.0	609.4	683.7
Maintenance and support	272.2	301.7	336.7	372.2	409.3	450.6
Operations	42.8	50.3	59.2	69.6	82.0	97.0
IT training and education	47.3	53.3	60.0	68.0	76.6	86.1
Services total	819.8	919.7	1,037.8	1,163.4	1,306.6	1,461.3
Packaged software						
System infrastructure software	173.5	198.8	227.1	259.1	294.8	315.4
Appl. development and deployment	112.6	127.7	144.5	163.3	184.2	206.4
Applications	301.0	345.6	394.6	448.7	508.4	562.0
Packaged software total	587.1	672.1	766.2	871.1	987.4	1,083.8
Hardware						
Systems						
High-end enterprise servers	47.5	9.0	7.2	9.9	17.6	27.8
Midrange enterprise servers	63.9	72.8	75.9	78.7	80.9	83.0
Volume servers	124.1	147.0	165.5	165.4	175.1	183.0
Servers total	235.6	228.8	248.5	254.0	273.5	293.9
Personal computers	839.2	966.6	1,137.4	1,218.9	1,336.3	1,451.1
Traditional workstations	3.4	3.0	2.7	2.4	2.2	2.1
Clients total	842.6	969.6	1,140.1	1,221.3	1,338.4	1,453.2
Systems total	1,078.1	1,198.4	1,388.6	1,475.3	1,612.0	1,747.0
Storage						
Disk systems	61.7	66.0	80.3	94.7	113.9	126.5
Tape automation	17.1	19.0	18.3	19.1	19.1	19.6
Storage total	78.8	85.0	98.6	113.8	133.0	146.1
Peripherals						
Printers and MFPs	208.5	210.7	220.7	237.2	253.6	264.5
Smart handheld devices	7.7	9.9	13.1	15.3	16.9	18.5
Other add-ons	85.8	92.3	99.7	107.8	120.1	129.1
Peripherals total	302.0	312.9	333.5	360.3	390.6	412.2
Networking equipment	231.7	248.0	266.5	286.1	307.1	341.6
Hardware total	1,690.6	1,844.3	2,087.3	2,235.5	2,442.7	2,647.0
Packaged software total	587.1	672.1	766.2	871.1	987.4	1,083.8
Services total	819.8	919.7	1,037.8	1,163.4	1,306.6	1,461.3
Total IT	3,097.4	3,436.1	3,891.2	4,270.0	4,736.7	5,192.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 322

GROWTH IN IT SPENDING IN POLAND, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	11.5	12.3	12.1	11.9	11.3	11.9
Implementation	12.6	13.3	12.4	13.3	12.2	12.8
Maintenance and support	10.8	11.6	10.5	10.0	10.1	10.5
Operations	17.5	17.7	17.7	17.7	18.3	17.9
IT training and education	12.9	12.4	13.4	12.6	12.4	12.7
Services total	12.2	12.8	12.1	12.3	11.8	12.3
Packaged software						
System infrastructure software	14.6	14.2	14.1	13.8	7.0	12.2
Appl. development and deployment	13.4	13.2	13.0	12.8	12.1	12.8
Applications	14.8	14.2	13.7	13.3	10.5	12.9
Packaged software total	14.5	14.0	13.7	13.4	9.8	12.7
Hardware						
Systems						
High-end enterprise servers	-81.0	-20.8	38.6	76.8	58.4	32.4
Midrange enterprise servers	13.8	4.3	3.7	2.8	2.6	3.4
Volume servers	18.5	12.6	-0.1	5.9	4.5	5.6
Servers total	-2.9	8.6	2.2	7.7	7.4	6.5
Personal computers	15.2	17.7	7.2	9.6	8.6	10.7
Traditional workstations	-10.4	-10.6	-10.0	-9.8	-4.9	-8.8
Clients total	15.2	17.7	7.2	9.6	8.6	10.7
Systems total	11.2	15.9	6.2	9.3	8.4	9.9
Storage						
Disk systems	7.0	21.7	17.9	20.3	11.1	17.7
Tape automation	11.1	-3.7	4.4	0.0	2.6	0.8
Storage total	7.9	16.0	15.4	16.9	9.8	14.5
Peripherals						
Printers and MFPs	1.0	4.8	7.5	6.9	4.3	5.9
Smart handheld devices	29.1	32.2	16.4	10.7	9.6	16.9
Other add-ons	7.6	8.0	8.2	11.4	7.5	8.8
Peripherals total	3.6	6.6	8.0	8.4	5.5	7.1
Networking equipment	7.0	7.5	7.4	7.3	11.2	8.3
Hardware total	9.1	13.2	7.1	9.3	8.4	9.5
Packaged software total	14.5	14.0	13.7	13.4	9.8	12.7
Services total	12.2	12.8	12.1	12.3	11.8	12.3
Total IT	10.9	13.2	9.7	10.9	9.6	10.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 323

PROPORTIONS OF IT SPENDING CATEGORIES IN POLAND, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.7	2.7	2.6	2.7	2.7	2.8
Implementation	12.1	12.3	12.3	12.6	12.9	13.2
Maintenance and support	8.8	8.8	8.7	8.7	8.6	8.7
Operations	1.4	1.5	1.5	1.6	1.7	1.9
IT training and education	1.5	1.6	1.5	1.6	1.6	1.7
Services total	26.5	26.8	26.7	27.2	27.6	28.1
Packaged software						
System infrastructure software	5.6	5.8	5.8	6.1	6.2	6.1
Appl. development and deployment	3.6	3.7	3.7	3.8	3.9	4.0
Applications	9.7	10.1	10.1	10.5	10.7	10.8
Packaged software total	19.0	19.6	19.7	20.4	20.8	20.9
Hardware						
Systems						
High-end enterprise servers	1.5	0.3	0.2	0.2	0.4	0.5
Midrange enterprise servers	2.1	2.1	1.9	1.8	1.7	1.6
Volume servers	4.0	4.3	4.3	3.9	3.7	3.5
Servers total	7.6	6.7	6.4	5.9	5.8	5.7
Personal computers	27.1	28.1	29.2	28.5	28.2	27.9
Traditional workstations	0.1	0.1	0.1	0.1	0.0	0.0
Clients total	27.1	28.1	29.2	28.5	28.2	27.9
Systems total	34.8	34.9	35.7	34.6	34.0	33.6
Storage						
Disk systems	2.0	1.9	2.1	2.2	2.4	2.4
Tape automation	0.6	0.6	0.5	0.4	0.4	0.4
Storage total	2.5	2.5	2.5	2.7	2.8	2.8
Peripherals						
Printers and MFPs	6.7	6.1	5.7	5.6	5.4	5.1
Smart handheld devices	0.2	0.3	0.3	0.4	0.4	0.4
Other add-ons	2.8	2.7	2.6	2.5	2.5	2.5
Peripherals total	9.8	9.1	8.6	8.4	8.2	7.9
Networking equipment	7.5	7.2	6.8	6.7	6.5	6.6
Hardware total	54.6	53.7	53.6	52.4	51.6	51.0
Packaged software total	19.0	19.6	19.7	20.4	20.8	20.9
Services total	26.5	26.8	26.7	27.2	27.6	28.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 324

POLAND PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	16.0	15.8	15.7	14.9	14.5	13.9
Implementation	18.3	18.1	18.1	17.7	17.5	17.2
Maintenance and support	25.4	25.2	25.3	24.7	23.9	23.0
Operations	16.2	15.8	15.7	14.9	14.3	14.1
IT training and education	17.7	17.4	17.3	17.0	16.1	15.7
Services total	19.7	19.4	19.3	18.8	18.3	17.8
Packaged software						
System infrastructure software	25.6	25.8	26.1	26.6	27.3	26.9
Appl. development and deployment	20.7	20.4	20.4	20.6	20.9	21.1
Applications	21.0	20.6	20.5	20.6	20.9	20.9
Packaged software total	22.1	21.9	21.9	22.1	22.4	22.4
Hardware						
Systems						
High-end enterprise servers	47.5	17.5	13.0	16.0	23.9	27.9
Midrange enterprise servers	23.0	24.2	24.8	23.6	22.6	22.1
Volume servers	16.2	18.0	17.9	16.1	15.4	14.8
Servers total	20.6	19.6	19.4	17.8	17.5	17.2
Personal computers	18.6	20.0	20.9	20.1	19.9	19.6
Traditional workstations	14.3	14.3	14.7	14.4	13.0	14.0
Clients total	18.6	20.0	20.9	20.1	19.8	19.6
Systems total	19.0	19.9	20.6	19.7	19.4	19.1
Storage						
Disk systems	22.0	21.5	22.4	22.9	24.0	23.9
Tape automation	20.7	22.2	21.0	20.6	19.6	19.5
Storage total	21.7	21.6	22.1	22.5	23.3	23.2
Peripherals						
Printers and MFPs	16.3	15.5	15.1	15.3	15.8	15.8
Smart handheld devices	15.9	16.5	17.7	18.3	18.0	17.4
Other add-ons	15.8	15.3	14.9	14.5	14.4	14.1
Peripherals total	16.1	15.5	15.1	15.1	15.4	15.3
Networking equipment	19.2	18.9	18.7	18.5	18.1	18.1
Hardware total	18.5	18.9	19.3	18.7	18.6	18.5
Packaged software total	22.1	21.9	21.9	22.1	22.4	22.4
Services total	19.7	19.4	19.3	18.8	18.3	17.8
Total IT	19.4	19.6	19.8	19.3	19.2	19.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 325

POLAND PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.3	0.3	0.3	0.3
Implementation	0.3	0.3	0.3	0.4	0.4	0.4
Maintenance and support	0.3	0.3	0.3	0.3	0.4	0.4
Operations	0.1	0.1	0.1	0.1	0.1	0.1
IT training and education	0.2	0.2	0.3	0.3	0.3	0.3
Services total	0.2	0.3	0.3	0.3	0.3	0.3
Packaged software						
System infrastructure software	0.4	0.4	0.4	0.5	0.5	0.5
Appl. development and deployment	0.3	0.3	0.3	0.4	0.4	0.4
Applications	0.3	0.4	0.4	0.5	0.5	0.5
Packaged software total	0.3	0.4	0.4	0.4	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.4	0.1	0.1	0.1	0.2	0.3
Midrange enterprise servers	0.4	0.5	0.5	0.5	0.5	0.5
Volume servers	0.6	0.7	0.7	0.6	0.6	0.6
Servers total	0.5	0.5	0.5	0.5	0.5	0.5
Personal computers	0.5	0.7	0.8	0.8	0.8	0.9
Traditional workstations	0.1	0.2	0.2	0.2	0.2	0.3
Clients total	0.5	0.7	0.8	0.8	0.8	0.9
Systems total	0.5	0.6	0.7	0.7	0.7	0.8
Storage						
Disk systems	0.3	0.3	0.4	0.4	0.5	0.5
Tape automation	0.6	0.6	0.6	0.6	0.6	0.6
Storage total	0.3	0.4	0.4	0.4	0.5	0.5
Peripherals						
Printers and MFPs	0.5	0.5	0.5	0.5	0.5	0.5
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.1
Other add-ons	0.7	0.8	0.9	0.9	0.9	1.0
Peripherals total	0.5	0.5	0.5	0.4	0.4	0.4
Networking equipment	0.5	0.5	0.5	0.5	0.5	0.5
Hardware total	0.5	0.6	0.6	0.6	0.6	0.6
Packaged software total	0.3	0.4	0.4	0.4	0.5	0.5
Services total	0.2	0.3	0.3	0.3	0.3	0.3
Total IT	0.4	0.4	0.4	0.4	0.5	0.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 326

IT SPENDING IN THE REST OF EASTERN EUROPE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	40.7	47.5	55.2	64.5	73.0	81.2
Implementation	173.3	205.2	238.7	278.5	315.3	353.4
Maintenance and support	90.2	102.8	118.0	139.5	158.2	178.1
Operations	19.7	23.4	27.9	33.5	39.4	43.3
IT training and education	17.1	19.9	23.1	27.2	31.0	34.3
Services total	340.9	398.8	462.9	543.2	617.0	690.3
Packaged software						
System infrastructure software	64.2	73.2	83.3	96.2	103.4	114.3
Appl. development and deployment	52.7	59.4	66.5	74.9	81.8	91.7
Applications	169.3	198.7	229.2	260.7	291.0	326.2
Packaged software total	286.2	331.4	379.0	431.7	476.2	532.2
Hardware						
Systems						
High-end enterprise servers	1.0	2.2	2.5	4.7	2.4	4.3
Midrange enterprise servers	22.0	25.0	25.3	29.2	33.5	35.8
Volume servers	112.3	124.4	138.4	156.3	174.9	197.9
Servers total	135.3	151.6	166.2	190.3	210.7	237.9
Personal computers	746.0	844.5	940.0	1,087.7	1,267.7	1,399.4
Traditional workstations	4.8	3.9	3.4	3.0	2.7	2.5
Clients total	750.8	848.4	943.5	1,090.7	1,270.4	1,401.9
Systems total	886.1	1,000.0	1,109.6	1,281.0	1,481.1	1,639.8
Storage						
Disk systems	26.3	30.1	36.6	41.2	47.3	55.8
Tape automation	6.4	6.6	7.4	8.1	9.6	10.2
Storage total	32.6	36.7	44.0	49.3	57.0	66.0
Peripherals						
Printers and MFPs	189.3	203.8	220.4	240.1	249.1	259.7
Smart handheld devices	4.2	5.3	6.5	7.1	7.7	9.4
Other add-ons	108.6	131.5	153.7	180.6	204.8	228.2
Peripherals total	302.1	340.5	380.6	427.8	461.6	497.3
Networking equipment	185.9	204.4	222.9	247.9	279.4	309.0
Hardware total	1,406.7	1,581.7	1,757.2	2,006.0	2,279.1	2,512.2
Packaged software total	286.2	331.4	379.0	431.7	476.2	532.2
Services total	340.9	398.8	462.9	543.2	617.0	690.3
Total IT	2,033.8	2,311.8	2,599.0	2,980.9	3,372.3	3,734.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 327

GROWTH IN IT SPENDING IN THE REST OF EASTERN EUROPE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	16.6	16.2	16.9	13.2	11.2	14.4
Implementation	18.4	16.4	16.7	13.2	12.1	14.6
Maintenance and support	14.1	14.8	18.2	13.4	12.6	14.7
Operations	18.7	19.0	20.4	17.5	9.9	16.7
IT training and education	16.9	16.0	17.4	14.2	10.4	14.5
Services total	17.0	16.1	17.4	13.6	11.9	14.7
Packaged software						
System infrastructure software	14.1	13.8	15.4	7.6	10.5	11.8
Appl. development and deployment	12.8	11.9	12.6	9.2	12.2	11.5
Applications	17.4	15.3	13.7	11.6	12.1	13.2
Packaged software total	15.8	14.4	13.9	10.3	11.8	12.6
Hardware						
Systems						
High-end enterprise servers	120.0	13.6	88.1	-49.0	78.6	18.1
Midrange enterprise servers	13.4	1.4	15.5	14.4	6.9	9.4
Volume servers	10.8	11.2	13.0	11.9	13.2	12.3
Servers total	12.0	9.7	14.5	10.8	12.9	11.9
Personal computers	13.2	11.3	15.7	16.6	10.4	13.5
Traditional workstations	-18.1	-12.6	-11.1	-12.8	-5.6	-10.6
Clients total	13.2	11.3	15.7	16.6	10.4	13.5
Systems total	12.9	11.0	15.4	15.6	10.7	13.2
Storage						
Disk systems	14.7	21.4	12.6	14.9	17.9	16.6
Tape automation	3.0	13.2	9.0	19.1	6.0	11.7
Storage total	12.4	19.9	12.0	15.6	15.8	15.8
Peripherals						
Printers and MFPs	7.6	8.2	8.9	3.8	4.3	6.3
Smart handheld devices	26.0	22.9	8.9	8.6	22.9	15.6
Other add-ons	21.1	16.9	17.5	13.4	11.4	14.8
Peripherals total	12.7	11.8	12.4	7.9	7.7	9.9
Networking equipment	9.9	9.0	11.2	12.7	10.6	10.9
Hardware total	12.4	11.1	14.2	13.6	10.2	12.3
Packaged software total	15.8	14.4	13.9	10.3	11.8	12.6
Services total	17.0	16.1	17.4	13.6	11.9	14.7
Total IT	13.7	12.4	14.7	13.1	10.7	12.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 328

PROPORTIONS OF IT SPENDING CATEGORIES IN THE REST OF EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.0	2.1	2.1	2.2	2.2	2.2
Implementation	8.5	8.9	9.2	9.3	9.3	9.5
Maintenance and support	4.4	4.4	4.5	4.7	4.7	4.8
Operations	1.0	1.0	1.1	1.1	1.2	1.2
IT training and education	0.8	0.9	0.9	0.9	0.9	0.9
Services total	16.8	17.2	17.8	18.2	18.3	18.5
Packaged software						
System infrastructure software	3.2	3.2	3.2	3.2	3.1	3.1
Appl. development and deployment	2.6	2.6	2.6	2.5	2.4	2.5
Applications	8.3	8.6	8.8	8.7	8.6	8.7
Packaged software total	14.1	14.3	14.6	14.5	14.1	14.3
Hardware						
Systems						
High-end enterprise servers	0.0	0.1	0.1	0.2	0.1	0.1
Midrange enterprise servers	1.1	1.1	1.0	1.0	1.0	1.0
Volume servers	5.5	5.4	5.3	5.2	5.2	5.3
Servers total	6.7	6.6	6.4	6.4	6.2	6.4
Personal computers	36.7	36.5	36.2	36.5	37.6	37.5
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	36.7	36.5	36.2	36.5	37.6	37.5
Systems total	43.6	43.3	42.7	43.0	43.9	43.9
Storage						
Disk systems	1.3	1.3	1.4	1.4	1.4	1.5
Tape automation	0.3	0.3	0.3	0.3	0.3	0.3
Storage total	1.6	1.6	1.7	1.7	1.7	1.8
Peripherals						
Printers and MFPs	9.3	8.8	8.5	8.1	7.4	7.0
Smart handheld devices	0.2	0.2	0.2	0.2	0.2	0.3
Other add-ons	5.3	5.7	5.9	6.1	6.1	6.1
Peripherals total	14.9	14.7	14.6	14.4	13.7	13.3
Networking equipment	9.1	8.8	8.6	8.3	8.3	8.3
Hardware total	69.2	68.4	67.6	67.3	67.6	67.3
Packaged software total	14.1	14.3	14.6	14.5	14.1	14.3
Services total	16.8	17.2	17.8	18.2	18.3	18.5
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 329

REST OF EASTERN EUROPE PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	7.9	8.2	8.4	8.3	8.2	7.8
Implementation	8.4	8.8	9.0	9.2	9.1	8.9
Maintenance and support	8.4	8.6	8.9	9.3	9.2	9.1
Operations	7.5	7.4	7.4	7.2	6.9	6.3
IT training and education	6.4	6.5	6.7	6.8	6.5	6.2
Services total	8.2	8.4	8.6	8.8	8.6	8.4
Packaged software						
System infrastructure software	9.5	9.5	9.6	9.9	9.6	9.7
Appl. development and deployment	9.7	9.5	9.4	9.4	9.3	9.4
Applications	11.8	11.9	11.9	12.0	11.9	12.1
Packaged software total	10.8	10.8	10.8	10.9	10.8	11.0
Hardware						
Systems						
High-end enterprise servers	1.0	4.3	4.5	7.6	3.3	4.3
Midrange enterprise servers	7.9	8.3	8.3	8.8	9.3	9.5
Volume servers	14.7	15.3	15.0	15.2	15.4	16.0
Servers total	11.8	13.0	12.9	13.4	13.5	13.9
Personal computers	16.5	17.5	17.3	18.0	18.8	18.9
Traditional workstations	20.3	18.7	18.7	18.1	15.8	16.9
Clients total	16.6	17.5	17.3	18.0	18.8	18.9
Systems total	15.6	16.6	16.5	17.1	17.8	18.0
Storage						
Disk systems	9.4	9.8	10.2	10.0	10.0	10.6
Tape automation	7.7	7.7	8.5	8.7	9.9	10.2
Storage total	9.0	9.3	9.9	9.7	10.0	10.5
Peripherals						
Printers and MFPs	14.8	15.0	15.1	15.5	15.5	15.5
Smart handheld devices	8.7	8.8	8.7	8.5	8.2	8.9
Other add-ons	20.1	21.8	23.0	24.3	24.6	24.9
Peripherals total	16.2	16.8	17.3	18.0	18.2	18.5
Networking equipment	15.4	15.6	15.7	16.0	16.5	16.4
Hardware total	15.4	16.2	16.3	16.8	17.4	17.5
Packaged software total	10.8	10.8	10.8	10.9	10.8	11.0
Services total	8.2	8.4	8.6	8.8	8.6	8.4
Total IT	12.8	13.2	13.2	13.5	13.7	13.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 330

REST OF EASTERN EUROPE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.2	0.2	0.2
Implementation	0.1	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.2
Packaged software						
System infrastructure software	0.1	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.1	0.1	0.2	0.2	0.2	0.2
Applications	0.2	0.2	0.2	0.3	0.3	0.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.1	0.2	0.2	0.2	0.2	0.2
Volume servers	0.5	0.6	0.6	0.6	0.6	0.7
Servers total	0.3	0.3	0.3	0.4	0.4	0.4
Personal computers	0.5	0.6	0.6	0.7	0.8	0.9
Traditional workstations	0.2	0.2	0.3	0.3	0.3	0.3
Clients total	0.5	0.6	0.6	0.7	0.8	0.8
Systems total	0.4	0.5	0.6	0.6	0.7	0.7
Storage						
Disk systems	0.1	0.1	0.2	0.2	0.2	0.2
Tape automation	0.2	0.2	0.2	0.3	0.3	0.3
Storage total	0.1	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.5	0.5	0.5	0.5	0.5	0.5
Smart handheld devices	0.1	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.9	1.1	1.3	1.5	1.6	1.7
Peripherals total	0.5	0.5	0.5	0.5	0.5	0.5
Networking equipment	0.4	0.4	0.4	0.4	0.5	0.5
Hardware total	0.4	0.5	0.5	0.5	0.6	0.6
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.1	0.1	0.1	0.1	0.1	0.2
Total IT	0.2	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 331

IT SPENDING IN ROMANIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	11.4	14.0	15.2	17.6	20.7	26.3
Implementation	55.0	66.7	71.8	82.4	97.4	123.2
Maintenance and support	34.2	39.6	42.2	48.2	58.0	73.4
Operations	5.5	6.5	7.2	8.6	10.4	13.1
IT training and education	5.1	6.2	6.8	7.8	9.3	11.8
Services total	111.2	133.0	143.1	164.6	195.8	247.9
Packaged software						
System infrastructure software	15.9	17.8	20.0	22.3	24.8	27.1
Appl. development and deployment	15.4	17.3	18.8	20.1	22.6	26.0
Applications	34.3	39.8	43.2	49.3	57.4	65.9
Packaged software total	65.6	74.9	82.0	91.7	104.8	119.1
Hardware						
Systems						
High-end enterprise servers	1.3	1.4	0.0	1.3	1.2	0.0
Midrange enterprise servers	4.8	7.1	5.9	7.9	9.4	10.3
Volume servers	38.2	43.6	44.0	50.0	55.8	62.3
Servers total	44.2	52.1	49.9	59.2	66.4	72.6
Personal computers	183.2	187.3	191.3	202.7	225.4	247.7
Traditional workstations	0.4	0.3	0.3	0.3	0.3	0.3
Clients total	183.6	187.7	191.7	203.0	225.7	247.9
Systems total	227.8	239.8	241.5	262.1	292.2	320.5
Storage						
Disk systems	6.2	7.0	9.1	10.0	12.3	15.5
Tape automation	2.9	3.1	2.5	3.0	3.0	3.1
Storage total	9.1	10.1	11.7	13.0	15.3	18.6
Peripherals						
Printers and MFPs	44.7	51.6	53.8	55.5	59.4	62.6
Smart handheld devices	1.9	2.3	2.8	3.2	3.7	4.5
Other add-ons	17.2	19.9	22.4	25.5	29.0	33.9
Peripherals total	63.8	73.8	79.1	84.2	92.1	101.0
Networking equipment	21.7	24.9	28.3	32.0	36.2	40.3
Hardware total	322.4	348.6	360.6	391.3	435.8	480.3
Packaged software total	65.6	74.9	82.0	91.7	104.8	119.1
Services total	111.2	133.0	143.1	164.6	195.8	247.9
Total IT	499.2	556.6	585.7	647.6	736.4	847.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 332

GROWTH IN IT SPENDING IN ROMANIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	23.5	8.1	16.0	17.9	26.6	17.0
Implementation	21.2	7.6	14.8	18.2	26.6	16.6
Maintenance and support	15.9	6.5	14.3	20.3	26.6	16.7
Operations	19.1	10.5	19.1	20.8	26.6	19.1
IT training and education	20.1	9.9	15.0	19.7	26.6	17.6
Services total	19.7	7.6	15.0	19.0	26.6	16.8
Packaged software						
System infrastructure software	11.9	12.1	11.8	11.2	9.4	11.1
Appl. development and deployment	12.3	8.8	6.7	12.2	15.4	10.7
Applications	16.0	8.5	14.2	16.4	14.8	13.4
Packaged software total	14.2	9.4	11.9	14.2	13.6	12.3
Hardware						
Systems						
High-end enterprise servers	8.3	-100.0	NA	-5.0	-100.0	NA
Midrange enterprise servers	49.8	-17.0	33.2	19.4	9.8	9.7
Volume servers	14.3	0.8	13.7	11.6	11.6	9.3
Servers total	17.9	-4.3	18.6	12.3	9.2	8.6
Personal computers	2.3	2.2	5.9	11.2	9.9	7.2
Traditional workstations	-18.6	-11.4	-12.9	18.5	-12.5	-5.4
Clients total	2.3	2.2	5.9	11.2	9.9	7.2
Systems total	5.3	0.7	8.5	11.5	9.7	7.5
Storage						
Disk systems	12.5	30.4	8.9	24.0	25.3	21.9
Tape automation	7.2	-18.0	20.0	-0.8	3.1	0.2
Storage total	10.8	15.7	11.3	18.2	20.9	16.5
Peripherals						
Printers and MFPs	15.6	4.3	3.0	7.1	5.3	4.9
Smart handheld devices	19.6	22.8	12.6	13.7	23.8	18.1
Other add-ons	15.6	12.5	13.9	13.8	16.9	14.3
Peripherals total	15.7	7.1	6.4	9.4	9.7	8.1
Networking equipment	14.7	13.7	13.1	13.1	11.2	12.8
Hardware total	8.1	3.4	8.5	11.4	10.2	8.3
Packaged software total	14.2	9.4	11.9	14.2	13.6	12.3
Services total	19.7	7.6	15.0	19.0	26.6	16.8
Total IT	11.5	5.2	10.6	13.7	15.1	11.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 333

PROPORTIONS OF IT SPENDING CATEGORIES IN ROMANIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.5	2.6	2.7	2.8	3.1
Implementation	11.0	12.0	12.3	12.7	13.2	14.5
Maintenance and support	6.8	7.1	7.2	7.4	7.9	8.7
Operations	1.1	1.2	1.2	1.3	1.4	1.6
IT training and education	1.0	1.1	1.2	1.2	1.3	1.4
Services total	22.3	23.9	24.4	25.4	26.6	29.3
Packaged software						
System infrastructure software	3.2	3.2	3.4	3.4	3.4	3.2
Appl. development and deployment	3.1	3.1	3.2	3.1	3.1	3.1
Applications	6.9	7.2	7.4	7.6	7.8	7.8
Packaged software total	13.1	13.5	14.0	14.2	14.2	14.1
Hardware						
Systems						
High-end enterprise servers	0.3	0.3	0.0	0.2	0.2	0.0
Midrange enterprise servers	1.0	1.3	1.0	1.2	1.3	1.2
Volume servers	7.6	7.8	7.5	7.7	7.6	7.3
Servers total	8.9	9.4	8.5	9.1	9.0	8.6
Personal computers	36.7	33.7	32.7	31.3	30.6	29.2
Traditional workstations	0.1	0.1	0.1	0.0	0.0	0.0
Clients total	36.7	33.7	32.7	31.3	30.6	29.2
Systems total	45.6	43.1	41.2	40.5	39.7	37.8
Storage						
Disk systems	1.2	1.3	1.6	1.5	1.7	1.8
Tape automation	0.6	0.6	0.4	0.5	0.4	0.4
Storage total	1.8	1.8	2.0	2.0	2.1	2.2
Peripherals						
Printers and MFPs	8.9	9.3	9.2	8.6	8.1	7.4
Smart handheld devices	0.4	0.4	0.5	0.5	0.5	0.5
Other add-ons	3.4	3.6	3.8	3.9	3.9	4.0
Peripherals total	12.8	13.3	13.5	13.0	12.5	11.9
Networking equipment	4.3	4.5	4.8	4.9	4.9	4.8
Hardware total	64.6	62.6	61.6	60.4	59.2	56.7
Packaged software total	13.1	13.5	14.0	14.2	14.2	14.1
Services total	22.3	23.9	24.4	25.4	26.6	29.3
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 334

ROMANIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.4	2.3	2.3	2.3	2.5
Implementation	2.7	2.9	2.7	2.7	2.8	3.1
Maintenance and support	3.2	3.3	3.2	3.2	3.4	3.7
Operations	2.1	2.1	1.9	1.8	1.8	1.9
IT training and education	1.9	2.0	2.0	1.9	2.0	2.1
Services total	2.7	2.8	2.7	2.7	2.7	3.0
Packaged software						
System infrastructure software	2.3	2.3	2.3	2.3	2.3	2.3
Appl. development and deployment	2.8	2.8	2.7	2.5	2.6	2.7
Applications	2.4	2.4	2.2	2.3	2.4	2.4
Packaged software total	2.5	2.4	2.3	2.3	2.4	2.5
Hardware						
Systems						
High-end enterprise servers	1.3	2.7	0.0	2.1	1.7	0.0
Midrange enterprise servers	1.7	2.4	1.9	2.4	2.6	2.7
Volume servers	5.0	5.4	4.8	4.9	4.9	5.0
Servers total	3.9	4.5	3.9	4.2	4.2	4.2
Personal computers	4.1	3.9	3.5	3.3	3.3	3.3
Traditional workstations	1.8	1.7	1.7	1.6	1.9	1.9
Clients total	4.0	3.9	3.5	3.3	3.3	3.3
Systems total	4.0	4.0	3.6	3.5	3.5	3.5
Storage						
Disk systems	2.2	2.3	2.5	2.4	2.6	2.9
Tape automation	3.5	3.6	2.9	3.3	3.1	3.1
Storage total	2.5	2.6	2.6	2.6	2.7	3.0
Peripherals						
Printers and MFPs	3.5	3.8	3.7	3.6	3.7	3.7
Smart handheld devices	4.0	3.9	3.8	3.8	3.9	4.2
Other add-ons	3.2	3.3	3.3	3.4	3.5	3.7
Peripherals total	3.4	3.6	3.6	3.5	3.6	3.7
Networking equipment	1.8	1.9	2.0	2.1	2.1	2.1
Hardware total	3.5	3.6	3.3	3.3	3.3	3.4
Packaged software total	2.5	2.4	2.3	2.3	2.4	2.5
Services total	2.7	2.8	2.7	2.7	2.7	3.0
Total IT	3.1	3.2	3.0	2.9	3.0	3.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 335

ROMANIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.0	0.0	0.1
Implementation	0.0	0.0	0.1	0.1	0.1	0.1
Maintenance and support	0.0	0.0	0.0	0.0	0.1	0.1
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.1
Packaged software						
System infrastructure software	0.0	0.0	0.0	0.0	0.0	0.0
Appl. development and deployment	0.0	0.0	0.0	0.0	0.0	0.0
Applications	0.0	0.0	0.0	0.0	0.1	0.1
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.0	0.1	0.0	0.1	0.1	0.1
Volume servers	0.2	0.2	0.2	0.2	0.2	0.2
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.2
Traditional workstations	0.0	0.0	0.0	0.0	0.0	0.0
Clients total	0.1	0.1	0.1	0.1	0.1	0.1
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.0	0.0	0.0	0.0	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.0	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.1	0.2	0.2	0.2	0.2	0.3
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.0	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.0	0.0	0.0	0.0	0.0	0.1
Services total	0.0	0.0	0.0	0.0	0.0	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 336

IT SPENDING IN RUSSIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	173.4	203.1	235.9	303.0	368.9	449.2
Implementation	597.8	706.1	823.7	990.3	1,179.9	1,408.1
Maintenance and support	219.1	258.5	295.7	353.8	440.0	540.1
Operations	84.1	104.8	122.8	158.9	201.2	249.1
IT training and education	99.8	119.2	138.2	165.5	210.7	251.7
Services total	1,174.2	1,391.8	1,616.3	1,971.5	2,400.7	2,898.2
Packaged software						
System infrastructure software	106.1	127.1	146.2	162.3	175.2	189.3
Appl. development and deployment	136.4	166.3	194.6	220.1	241.9	265.3
Applications	363.6	445.6	524.2	595.6	657.9	719.3
Packaged software total	606.1	739.0	865.0	978.0	1,075.0	1,174.0
Hardware						
Systems						
High-end enterprise servers	31.3	27.7	29.1	35.2	41.2	53.3
Midrange enterprise servers	44.1	44.2	50.9	58.5	67.6	77.6
Volume servers	249.5	258.8	306.5	357.2	405.2	447.3
Servers total	325.0	330.8	386.6	450.9	514.0	578.2
Personal computers	1,628.0	1,661.8	1,915.0	2,184.1	2,442.8	2,760.8
Traditional workstations	5.1	4.2	3.4	2.7	2.4	2.2
Clients total	1,633.1	1,666.0	1,918.4	2,186.8	2,445.2	2,763.0
Systems total	1,958.0	1,996.8	2,305.0	2,637.6	2,959.2	3,341.2
Storage						
Disk systems	60.1	74.8	88.3	103.6	122.7	140.6
Tape automation	26.2	26.0	27.1	29.2	31.0	33.2
Storage total	86.2	100.7	115.4	132.8	153.7	173.8
Peripherals						
Printers and MFPs	537.3	574.6	632.3	674.2	690.0	719.5
Smart handheld devices	14.6	18.5	22.3	24.6	27.4	31.2
Other add-ons	121.0	132.3	144.5	157.8	180.4	201.4
Peripherals total	672.9	725.3	799.1	856.6	897.8	952.1
Networking equipment	379.6	417.6	458.2	499.6	545.1	613.1
Hardware total	3,096.8	3,240.4	3,677.6	4,126.7	4,555.8	5,080.1
Packaged software total	606.1	739.0	865.0	978.0	1,075.0	1,174.0
Services total	1,174.2	1,391.8	1,616.3	1,971.5	2,400.7	2,898.2
Total IT	4,877.1	5,371.2	6,158.9	7,076.2	8,031.5	9,152.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 337

GROWTH IN IT SPENDING IN RUSSIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	17.1	16.1	28.4	21.8	21.8	21.9
Implementation	18.1	16.6	20.2	19.1	19.3	18.8
Maintenance and support	18.0	14.4	19.6	24.4	22.8	20.2
Operations	24.7	17.1	29.4	26.6	23.8	24.2
IT training and education	19.4	16.0	19.8	27.3	19.4	20.5
Services total	18.5	16.1	22.0	21.8	20.7	20.1
Packaged software						
System infrastructure software	19.8	15.0	11.0	7.9	8.1	10.5
Appl. development and deployment	21.9	17.0	13.1	9.9	9.7	12.4
Applications	22.6	17.6	13.6	10.5	9.3	12.7
Packaged software total	21.9	17.1	13.1	9.9	9.2	12.3
Hardware						
Systems						
High-end enterprise servers	-11.4	4.8	21.0	17.0	29.5	17.7
Midrange enterprise servers	0.2	15.3	14.8	15.7	14.8	15.1
Volume servers	3.7	18.4	16.5	13.4	10.4	14.7
Servers total	1.8	16.9	16.6	14.0	12.5	15.0
Personal computers	2.1	15.2	14.0	11.8	13.0	13.5
Traditional workstations	-17.8	-20.4	-20.9	-10.3	-6.7	-14.8
Clients total	2.1	15.2	14.0	11.8	13.0	13.5
Systems total	2.0	15.4	14.4	12.2	12.9	13.7
Storage						
Disk systems	24.5	18.1	17.3	18.4	14.5	17.1
Tape automation	-0.8	4.3	8.0	6.2	6.9	6.4
Storage total	16.8	14.5	15.2	15.7	13.0	14.6
Peripherals						
Printers and MFPs	6.9	10.0	6.6	2.3	4.3	5.8
Smart handheld devices	26.7	20.9	10.5	11.2	13.9	14.1
Other add-ons	9.3	9.2	9.2	14.3	11.6	11.1
Peripherals total	7.8	10.2	7.2	4.8	6.0	7.0
Networking equipment	10.0	9.7	9.0	9.1	12.5	10.1
Hardware total	4.6	13.5	12.2	10.4	11.5	11.9
Packaged software total	21.9	17.1	13.1	9.9	9.2	12.3
Services total	18.5	16.1	22.0	21.8	20.7	20.1
Total IT	10.1	14.7	14.9	13.5	14.0	14.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 338

PROPORTIONS OF IT SPENDING CATEGORIES IN RUSSIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.6	3.8	3.8	4.3	4.6	4.9
Implementation	12.3	13.1	13.4	14.0	14.7	15.4
Maintenance and support	4.5	4.8	4.8	5.0	5.5	5.9
Operations	1.7	2.0	2.0	2.2	2.5	2.7
IT training and education	2.0	2.2	2.2	2.3	2.6	2.7
Services total	24.1	25.9	26.2	27.9	29.9	31.7
Packaged software						
System infrastructure software	2.2	2.4	2.4	2.3	2.2	2.1
Appl. development and deployment	2.8	3.1	3.2	3.1	3.0	2.9
Applications	7.5	8.3	8.5	8.4	8.2	7.9
Packaged software total	12.4	13.8	14.0	13.8	13.4	12.8
Hardware						
Systems						
High-end enterprise servers	0.6	0.5	0.5	0.5	0.5	0.6
Midrange enterprise servers	0.9	0.8	0.8	0.8	0.8	0.8
Volume servers	5.1	4.8	5.0	5.0	5.0	4.9
Servers total	6.7	6.2	6.3	6.4	6.4	6.3
Personal computers	33.4	30.9	31.1	30.9	30.4	30.2
Traditional workstations	0.1	0.1	0.1	0.0	0.0	0.0
Clients total	33.4	30.9	31.1	30.9	30.4	30.2
Systems total	40.1	37.2	37.4	37.3	36.8	36.5
Storage						
Disk systems	1.2	1.4	1.4	1.5	1.5	1.5
Tape automation	0.5	0.5	0.4	0.4	0.4	0.4
Storage total	1.8	1.9	1.9	1.9	1.9	1.9
Peripherals						
Printers and MFPs	11.0	10.7	10.3	9.5	8.6	7.9
Smart handheld devices	0.3	0.3	0.4	0.3	0.3	0.3
Other add-ons	2.5	2.5	2.3	2.2	2.2	2.2
Peripherals total	13.8	13.5	13.0	12.1	11.2	10.4
Networking equipment	7.8	7.8	7.4	7.1	6.8	6.7
Hardware total	63.5	60.3	59.7	58.3	56.7	55.5
Packaged software total	12.4	13.8	14.0	13.8	13.4	12.8
Services total	24.1	25.9	26.2	27.9	29.9	31.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 339

RUSSIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	33.7	34.9	35.8	39.1	41.2	43.4
Implementation	29.1	30.2	31.1	32.6	33.9	35.4
Maintenance and support	20.5	21.6	22.2	23.5	25.6	27.5
Operations	31.8	33.0	32.6	33.9	35.0	36.2
IT training and education	37.4	39.0	39.9	41.3	44.4	45.8
Services total	28.2	29.4	30.1	31.8	33.6	35.3
Packaged software						
System infrastructure software	15.7	16.5	16.8	16.6	16.2	16.1
Appl. development and deployment	25.1	26.6	27.5	27.7	27.4	27.2
Applications	25.4	26.6	27.3	27.4	27.0	26.7
Packaged software total	22.9	24.1	24.7	24.8	24.4	24.3
Hardware						
Systems						
High-end enterprise servers	31.3	53.7	52.9	56.7	56.0	53.4
Midrange enterprise servers	15.9	14.7	16.6	17.5	18.9	20.7
Volume servers	32.6	31.8	33.2	34.8	35.7	36.2
Servers total	28.4	28.3	30.1	31.7	32.8	33.8
Personal computers	36.1	34.4	35.2	36.1	36.3	37.3
Traditional workstations	21.7	20.0	18.3	15.8	14.2	14.9
Clients total	36.0	34.3	35.2	36.0	36.2	37.3
Systems total	34.5	33.1	34.2	35.2	35.6	36.6
Storage						
Disk systems	21.5	24.4	24.6	25.1	25.9	26.6
Tape automation	31.6	30.3	31.1	31.5	31.9	33.0
Storage total	23.8	25.6	25.9	26.2	26.9	27.6
Peripherals						
Printers and MFPs	42.0	42.3	43.3	43.4	42.9	43.0
Smart handheld devices	30.1	30.7	30.1	29.5	29.2	29.4
Other add-ons	22.3	21.9	21.6	21.2	21.7	22.0
Peripherals total	36.0	35.8	36.3	36.0	35.4	35.3
Networking equipment	31.5	31.8	32.2	32.2	32.1	32.5
Hardware total	34.0	33.2	34.0	34.6	34.7	35.4
Packaged software total	22.9	24.1	24.7	24.8	24.4	24.3
Services total	28.2	29.4	30.1	31.8	33.6	35.3
Total IT	30.6	30.6	31.3	32.1	32.6	33.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 340

RUSSIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.6	0.8	0.9	1.0
Implementation	0.4	0.5	0.6	0.7	0.8	0.8
Maintenance and support	0.2	0.3	0.3	0.3	0.4	0.4
Operations	0.1	0.2	0.2	0.2	0.2	0.3
IT training and education	0.5	0.6	0.6	0.7	0.9	1.0
Services total	0.3	0.4	0.4	0.5	0.6	0.6
Packaged software						
System infrastructure software	0.2	0.3	0.3	0.3	0.3	0.3
Appl. development and deployment	0.3	0.4	0.5	0.5	0.5	0.5
Applications	0.4	0.5	0.6	0.6	0.6	0.6
Packaged software total	0.4	0.4	0.5	0.5	0.5	0.5
Hardware						
Systems						
High-end enterprise servers	0.2	0.2	0.3	0.3	0.4	0.5
Midrange enterprise servers	0.3	0.3	0.4	0.4	0.5	0.5
Volume servers	1.2	1.2	1.3	1.4	1.4	1.5
Servers total	0.7	0.7	0.8	0.9	1.0	1.0
Personal computers	1.1	1.1	1.3	1.4	1.5	1.7
Traditional workstations	0.2	0.3	0.3	0.3	0.3	0.3
Clients total	1.0	1.1	1.3	1.4	1.5	1.7
Systems total	1.0	1.0	1.1	1.3	1.4	1.5
Storage						
Disk systems	0.3	0.4	0.4	0.5	0.5	0.6
Tape automation	0.9	0.9	0.9	0.9	0.9	0.9
Storage total	0.4	0.4	0.5	0.5	0.6	0.6
Peripherals						
Printers and MFPs	1.3	1.3	1.4	1.4	1.4	1.4
Smart handheld devices	0.2	0.2	0.1	0.1	0.1	0.1
Other add-ons	1.0	1.1	1.2	1.3	1.4	1.5
Peripherals total	1.1	1.1	1.1	1.0	1.0	1.0
Networking equipment	0.8	0.8	0.9	0.9	0.9	0.9
Hardware total	0.9	1.0	1.0	1.1	1.2	1.2
Packaged software total	0.4	0.4	0.5	0.5	0.5	0.5
Services total	0.3	0.4	0.4	0.5	0.6	0.6
Total IT	0.6	0.6	0.7	0.7	0.8	0.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 341

IT SPENDING IN SLOVAKIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	18.4	21.5	25.0	28.1	30.6	33.4
Implementation	94.0	108.3	125.1	141.7	152.7	166.7
Maintenance and support	52.4	60.6	66.6	74.5	81.9	89.4
Operations	4.6	6.4	8.0	11.1	13.6	14.9
IT training and education	6.3	7.1	8.1	9.0	9.9	10.8
Services total	175.6	203.8	232.8	264.4	288.7	315.2
Packaged software						
System infrastructure software	29.2	32.3	35.4	38.7	42.6	46.9
Appl. development and deployment	23.0	25.6	28.6	32.0	35.6	38.8
Applications	61.5	69.6	77.3	85.5	95.6	105.6
Packaged software total	113.7	127.5	141.3	156.2	173.8	191.4
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	1.2	0.0	1.2	2.3
Midrange enterprise servers	19.1	24.2	22.7	28.1	29.9	29.1
Volume servers	37.9	30.0	32.7	37.1	39.4	42.2
Servers total	57.0	54.2	56.6	65.2	70.5	73.5
Personal computers	127.1	133.3	133.8	143.3	158.7	170.8
Traditional workstations	1.0	0.9	0.8	0.7	0.7	0.7
Clients total	128.1	134.2	134.6	144.0	159.4	171.5
Systems total	185.1	188.4	191.2	209.2	229.9	245.0
Storage						
Disk systems	12.2	11.9	13.6	16.7	19.0	21.5
Tape automation	3.2	3.6	3.5	4.1	4.4	4.5
Storage total	15.4	15.5	17.1	20.8	23.4	26.0
Peripherals						
Printers and MFPs	35.0	38.1	40.8	43.7	45.7	46.7
Smart handheld devices	2.1	2.5	3.2	3.8	4.6	5.1
Other add-ons	23.8	26.2	28.9	31.8	34.7	38.5
Peripherals total	60.9	66.8	72.8	79.3	85.0	90.3
Networking equipment	40.1	43.8	47.8	52.1	56.7	63.6
Hardware total	301.4	314.5	329.0	361.3	395.0	424.9
Packaged software total	113.7	127.5	141.3	156.2	173.8	191.4
Services total	175.6	203.8	232.8	264.4	288.7	315.2
Total IT	590.7	645.8	703.1	781.9	857.5	931.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 342

GROWTH IN IT SPENDING IN SLOVAKIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	16.9	16.3	12.4	8.9	9.2	11.7
Implementation	15.2	15.6	13.2	7.8	9.2	11.4
Maintenance and support	15.6	9.9	11.9	10.0	9.2	10.2
Operations	38.3	25.9	39.1	22.6	9.2	23.7
IT training and education	13.0	14.4	11.2	9.5	9.2	11.1
Services total	16.0	14.2	13.6	9.2	9.2	11.5
Packaged software						
System infrastructure software	10.6	9.6	9.4	10.0	10.2	9.8
Appl. development and deployment	11.3	11.7	11.9	11.2	9.0	11.0
Applications	13.2	11.1	10.6	11.8	10.5	11.0
Packaged software total	12.1	10.8	10.6	11.2	10.1	10.7
Hardware						
Systems						
High-end enterprise servers	NA	NA	-100.0	NA	98.0	NA
Midrange enterprise servers	26.8	-6.3	23.8	6.5	-2.9	4.7
Volume servers	-20.9	9.2	13.3	6.3	7.0	8.9
Servers total	-4.9	4.5	15.1	8.2	4.3	7.9
Personal computers	4.9	0.4	7.1	10.8	7.6	6.4
Traditional workstations	-15.4	-4.1	-13.6	1.0	-5.6	-5.7
Clients total	4.9	0.4	7.1	10.8	7.6	6.4
Systems total	1.8	1.5	9.4	9.9	6.6	6.8
Storage						
Disk systems	-1.9	14.1	22.4	13.7	13.6	15.9
Tape automation	12.5	-2.8	17.1	7.3	2.3	5.7
Storage total	1.1	10.2	21.3	12.5	11.5	13.8
Peripherals						
Printers and MFPs	8.6	7.2	7.2	4.5	2.2	5.3
Smart handheld devices	22.7	24.8	18.9	20.7	12.5	19.2
Other add-ons	10.2	10.2	10.0	9.3	10.8	10.1
Peripherals total	9.7	9.1	8.8	7.2	6.2	7.8
Networking equipment	9.4	9.0	9.0	8.8	12.1	9.7
Hardware total	4.4	4.6	9.8	9.3	7.6	7.8
Packaged software total	12.1	10.8	10.6	11.2	10.1	10.7
Services total	16.0	14.2	13.6	9.2	9.2	11.5
Total IT	9.3	8.9	11.2	9.7	8.6	9.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 343

PROPORTIONS OF IT SPENDING CATEGORIES IN SLOVAKIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.1	3.3	3.6	3.6	3.6	3.6
Implementation	15.9	16.8	17.8	18.1	17.8	17.9
Maintenance and support	8.9	9.4	9.5	9.5	9.6	9.6
Operations	0.8	1.0	1.1	1.4	1.6	1.6
IT training and education	1.1	1.1	1.2	1.2	1.2	1.2
Services total	29.7	31.6	33.1	33.8	33.7	33.8
Packaged software						
System infrastructure software	4.9	5.0	5.0	5.0	5.0	5.0
Appl. development and deployment	3.9	4.0	4.1	4.1	4.2	4.2
Applications	10.4	10.8	11.0	10.9	11.1	11.3
Packaged software total	19.2	19.7	20.1	20.0	20.3	20.5
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.2	0.0	0.1	0.2
Midrange enterprise servers	3.2	3.7	3.2	3.6	3.5	3.1
Volume servers	6.4	4.6	4.7	4.7	4.6	4.5
Servers total	9.6	8.4	8.1	8.3	8.2	7.9
Personal computers	21.5	20.6	19.0	18.3	18.5	18.3
Traditional workstations	0.2	0.1	0.1	0.1	0.1	0.1
Clients total	21.5	20.6	19.0	18.3	18.5	18.3
Systems total	31.3	29.2	27.2	26.8	26.8	26.3
Storage						
Disk systems	2.1	1.8	1.9	2.1	2.2	2.3
Tape automation	0.5	0.6	0.5	0.5	0.5	0.5
Storage total	2.6	2.4	2.4	2.7	2.7	2.8
Peripherals						
Printers and MFPs	5.9	5.9	5.8	5.6	5.3	5.0
Smart handheld devices	0.4	0.4	0.5	0.5	0.5	0.5
Other add-ons	4.0	4.1	4.1	4.1	4.1	4.1
Peripherals total	10.3	10.3	10.4	10.1	9.9	9.7
Networking equipment	6.8	6.8	6.8	6.7	6.6	6.8
Hardware total	51.0	48.7	46.8	46.2	46.1	45.6
Packaged software total	19.2	19.7	20.1	20.0	20.3	20.5
Services total	29.7	31.6	33.1	33.8	33.7	33.8
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 344

SLOVAKIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.6	3.7	3.8	3.6	3.4	3.2
Implementation	4.6	4.6	4.7	4.7	4.4	4.2
Maintenance and support	4.9	5.1	5.0	4.9	4.8	4.6
Operations	1.7	2.0	2.1	2.4	2.4	2.2
IT training and education	2.3	2.3	2.3	2.3	2.1	2.0
Services total	4.2	4.3	4.3	4.3	4.0	3.8
Packaged software						
System infrastructure software	4.3	4.2	4.1	4.0	3.9	4.0
Appl. development and deployment	4.2	4.1	4.0	4.0	4.0	4.0
Applications	4.3	4.2	4.0	3.9	3.9	3.9
Packaged software total	4.3	4.2	4.0	4.0	4.0	4.0
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	2.2	0.0	1.6	2.3
Midrange enterprise servers	6.9	8.1	7.4	8.4	8.4	7.7
Volume servers	4.9	3.7	3.5	3.6	3.5	3.4
Servers total	5.0	4.6	4.4	4.6	4.5	4.3
Personal computers	2.8	2.8	2.5	2.4	2.4	2.3
Traditional workstations	4.4	4.2	4.6	4.3	4.4	4.6
Clients total	2.8	2.8	2.5	2.4	2.4	2.3
Systems total	3.3	3.1	2.8	2.8	2.8	2.7
Storage						
Disk systems	4.3	3.9	3.8	4.0	4.0	4.1
Tape automation	3.9	4.2	4.0	4.4	4.5	4.5
Storage total	4.2	4.0	3.8	4.1	4.1	4.1
Peripherals						
Printers and MFPs	2.7	2.8	2.8	2.8	2.8	2.8
Smart handheld devices	4.3	4.2	4.3	4.5	4.8	4.8
Other add-ons	4.4	4.3	4.3	4.3	4.2	4.2
Peripherals total	3.3	3.3	3.3	3.3	3.4	3.4
Networking equipment	3.3	3.3	3.4	3.4	3.3	3.4
Hardware total	3.3	3.2	3.0	3.0	3.0	3.0
Packaged software total	4.3	4.2	4.0	4.0	4.0	4.0
Services total	4.2	4.3	4.3	4.3	4.0	3.8
Total IT	3.7	3.7	3.6	3.5	3.5	3.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 345

SLOVAKIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.1	0.2	0.2	0.2	0.2	0.2
Volume servers	0.2	0.1	0.1	0.1	0.1	0.1
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.1
Traditional workstations	0.0	0.1	0.1	0.1	0.1	0.1
Clients total	0.1	0.1	0.1	0.1	0.1	0.1
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.1	0.1	0.1	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.2	0.2	0.2	0.3	0.3	0.3
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 346

IT SPENDING IN SLOVENIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	11.6	12.9	14.1	15.3	16.3	17.8
Implementation	43.7	48.1	51.6	56.2	63.2	69.2
Maintenance and support	23.8	25.6	27.6	30.4	32.7	35.8
Operations	4.7	5.5	6.4	7.7	8.7	9.6
IT training and education	7.4	7.7	7.6	8.0	8.0	8.8
Services total	91.2	99.8	107.2	117.7	128.9	141.3
Packaged software						
System infrastructure software	20.1	22.3	24.5	27.0	29.7	32.3
Appl. development and deployment	16.4	18.3	20.3	22.5	24.9	26.5
Applications	45.0	52.0	59.9	66.0	75.3	82.3
Packaged software total	81.6	92.6	104.7	115.5	129.9	141.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	2.8	0.0	2.6	0.0
Midrange enterprise servers	14.2	14.2	10.7	12.0	12.8	14.7
Volume servers	21.9	25.6	30.5	34.8	37.6	39.2
Servers total	36.0	39.8	44.0	46.8	53.0	53.8
Personal computers	111.6	121.7	135.6	146.7	155.3	159.9
Traditional workstations	0.8	0.7	0.6	0.6	0.5	0.5
Clients total	112.4	122.5	136.2	147.3	155.8	160.4
Systems total	148.4	162.3	180.2	194.1	208.8	214.2
Storage						
Disk systems	7.6	7.8	10.4	12.1	14.7	15.9
Tape automation	3.2	3.5	3.4	3.7	3.8	3.8
Storage total	10.8	11.2	13.7	15.7	18.6	19.7
Peripherals						
Printers and MFPs	27.6	28.7	29.7	29.4	30.4	30.9
Smart handheld devices	2.2	2.5	3.0	3.2	3.5	3.8
Other add-ons	16.5	18.2	19.7	20.9	23.7	26.2
Peripherals total	46.3	49.4	52.4	53.6	57.6	61.0
Networking equipment	34.2	36.1	38.2	40.2	42.7	47.6
Hardware total	239.8	259.0	284.5	303.6	327.6	342.5
Packaged software total	81.6	92.6	104.7	115.5	129.9	141.1
Services total	91.2	99.8	107.2	117.7	128.9	141.3
Total IT	412.6	451.4	496.5	536.8	586.4	624.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 347

GROWTH IN IT SPENDING IN SLOVENIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	11.6	9.0	9.0	6.2	9.6	8.4
Implementation	10.0	7.3	8.9	12.4	9.6	9.5
Maintenance and support	7.6	7.6	10.2	7.6	9.6	8.7
Operations	16.1	17.2	20.5	13.2	9.6	15.1
IT training and education	3.9	-1.1	5.2	0.5	9.6	3.5
Services total	9.4	7.5	9.7	9.6	9.6	9.1
Packaged software						
System infrastructure software	10.5	10.1	10.1	10.1	8.8	9.8
Appl. development and deployment	11.5	10.9	10.9	10.5	6.4	9.7
Applications	15.6	15.2	10.1	14.1	9.4	12.2
Packaged software total	13.5	13.1	10.3	12.5	8.7	11.1
Hardware						
Systems						
High-end enterprise servers	NA	NA	-100.0	NA	-100.0	NA
Midrange enterprise servers	0.1	-24.6	12.3	6.6	14.5	0.8
Volume servers	17.4	18.9	14.1	7.9	4.3	11.2
Servers total	10.6	10.5	6.4	13.1	1.6	7.8
Personal computers	9.1	11.4	8.2	5.8	3.0	7.0
Traditional workstations	-10.7	-10.9	-8.7	-6.6	-10.3	-9.2
Clients total	9.1	11.4	8.2	5.8	3.0	7.0
Systems total	9.3	11.0	7.7	7.6	2.6	7.2
Storage						
Disk systems	2.2	33.3	16.4	22.3	7.9	19.6
Tape automation	7.3	-2.0	9.0	3.4	0.0	2.5
Storage total	3.7	22.4	14.6	17.8	6.3	15.1
Peripherals						
Printers and MFPs	4.0	3.6	-1.0	3.2	1.7	1.9
Smart handheld devices	14.8	19.4	9.1	8.4	9.1	11.4
Other add-ons	10.3	8.1	6.3	13.5	10.5	9.6
Peripherals total	6.7	6.0	2.3	7.5	5.8	5.4
Networking equipment	5.4	5.8	5.2	6.2	11.5	7.2
Hardware total	8.0	9.9	6.7	7.9	4.5	7.2
Packaged software total	13.5	13.1	10.3	12.5	8.7	11.1
Services total	9.4	7.5	9.7	9.6	9.6	9.1
Total IT	9.4	10.0	8.1	9.3	6.6	8.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 348

PROPORTIONS OF IT SPENDING CATEGORIES IN SLOVENIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.8	2.9	2.8	2.9	2.8	2.9
Implementation	10.6	10.7	10.4	10.5	10.8	11.1
Maintenance and support	5.8	5.7	5.6	5.7	5.6	5.7
Operations	1.1	1.2	1.3	1.4	1.5	1.5
IT training and education	1.8	1.7	1.5	1.5	1.4	1.4
Services total	22.1	22.1	21.6	21.9	22.0	22.6
Packaged software						
System infrastructure software	4.9	4.9	4.9	5.0	5.1	5.2
Appl. development and deployment	4.0	4.1	4.1	4.2	4.2	4.2
Applications	10.9	11.5	12.1	12.3	12.8	13.2
Packaged software total	19.8	20.5	21.1	21.5	22.1	22.6
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.6	0.0	0.4	0.0
Midrange enterprise servers	3.4	3.1	2.2	2.2	2.2	2.3
Volume servers	5.3	5.7	6.1	6.5	6.4	6.3
Servers total	8.7	8.8	8.9	8.7	9.0	8.6
Personal computers	27.1	27.0	27.3	27.3	26.5	25.6
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	27.1	27.0	27.3	27.3	26.5	25.6
Systems total	36.0	36.0	36.3	36.2	35.6	34.3
Storage						
Disk systems	1.8	1.7	2.1	2.2	2.5	2.5
Tape automation	0.8	0.8	0.7	0.7	0.7	0.6
Storage total	2.6	2.5	2.8	2.9	3.2	3.2
Peripherals						
Printers and MFPs	6.7	6.4	6.0	5.5	5.2	4.9
Smart handheld devices	0.5	0.5	0.6	0.6	0.6	0.6
Other add-ons	4.0	4.0	4.0	3.9	4.0	4.2
Peripherals total	11.2	10.9	10.5	10.0	9.8	9.8
Networking equipment	8.3	8.0	7.7	7.5	7.3	7.6
Hardware total	58.1	57.4	57.3	56.6	55.9	54.8
Packaged software total	19.8	20.5	21.1	21.5	22.1	22.6
Services total	22.1	22.1	21.6	21.9	22.0	22.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 349

SLOVENIA PROPORTIONS OF THE IT SPENDING IN CENTRAL AND EASTERN EUROPE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.2	2.1	2.0	1.8	1.7
Implementation	2.1	2.1	1.9	1.8	1.8	1.7
Maintenance and support	2.2	2.1	2.1	2.0	1.9	1.8
Operations	1.8	1.7	1.7	1.6	1.5	1.4
IT training and education	2.8	2.5	2.2	2.0	1.7	1.6
Services total	2.2	2.1	2.0	1.9	1.8	1.7
Packaged software						
System infrastructure software	3.0	2.9	2.8	2.8	2.8	2.8
Appl. development and deployment	3.0	2.9	2.9	2.8	2.8	2.7
Applications	3.1	3.1	3.1	3.0	3.1	3.1
Packaged software total	3.1	3.0	3.0	2.9	3.0	2.9
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	5.1	0.0	3.5	0.0
Midrange enterprise servers	5.1	4.7	3.5	3.6	3.6	3.9
Volume servers	2.9	3.1	3.3	3.4	3.3	3.2
Servers total	3.1	3.4	3.4	3.3	3.4	3.1
Personal computers	2.5	2.5	2.5	2.4	2.3	2.2
Traditional workstations	3.4	3.4	3.4	3.4	3.2	3.2
Clients total	2.5	2.5	2.5	2.4	2.3	2.2
Systems total	2.6	2.7	2.7	2.6	2.5	2.3
Storage						
Disk systems	2.7	2.5	2.9	2.9	3.1	3.0
Tape automation	3.9	4.0	3.9	4.0	3.9	3.8
Storage total	3.0	2.9	3.1	3.1	3.3	3.1
Peripherals						
Printers and MFPs	2.2	2.1	2.0	1.9	1.9	1.8
Smart handheld devices	4.5	4.1	4.0	3.9	3.7	3.6
Other add-ons	3.0	3.0	2.9	2.8	2.9	2.9
Peripherals total	2.5	2.4	2.4	2.3	2.3	2.3
Networking equipment	2.8	2.8	2.7	2.6	2.5	2.5
Hardware total	2.6	2.7	2.6	2.5	2.5	2.4
Packaged software total	3.1	3.0	3.0	2.9	3.0	2.9
Services total	2.2	2.1	2.0	1.9	1.8	1.7
Total IT	2.6	2.6	2.5	2.4	2.4	2.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 350

SLOVENIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.0	0.0	0.0
Implementation	0.0	0.0	0.0	0.0	0.0	0.0
Maintenance and support	0.0	0.0	0.0	0.0	0.0	0.0
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Packaged software						
System infrastructure software	0.0	0.0	0.0	0.0	0.1	0.1
Appl. development and deployment	0.0	0.0	0.0	0.0	0.1	0.0
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.0	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.1	0.1	0.1	0.1	0.1	0.1
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.1
Traditional workstations	0.0	0.0	0.0	0.1	0.1	0.1
Clients total	0.1	0.1	0.1	0.1	0.1	0.1
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.0	0.0	0.0	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.1	0.2	0.2	0.2	0.2	0.2
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.0	0.1	0.1	0.1	0.1	0.1
Services total	0.0	0.0	0.0	0.0	0.0	0.0
Total IT	0.0	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

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LATIN AMERICA

IT spending patterns in Latin America closely mirror economic trends. Over the medium term, low rates of IT penetration (IT represents approximately 1.4% of GDP, compared with 3.5% in North America), ongoing infrastructure development, and promising economic prospects bode well for IT spending in the region. Unfortunately, the past two years have seen major economic and political disturbances that have completely overwhelmed these positive IT drivers. A chaotic debt default and currency crisis in Argentina, fears of one in Brazil, an intensification of guerrilla violence in Colombia, and an attempted coup in Venezuela all served to depress regional economic activity. When layered over a global environment characterized by sluggish economic growth, war in Afghanistan, and war in Iraq, the impact on Latin America's IT market was devastating.

A chaotic debt default and currency crisis in Argentina, fears of one in Brazil, an intensification of guerrilla violence in Colombia, and an attempted coup in Venezuela all served to depress regional economic activity.

IT spending was generally depressed in the first half of 2003, reflecting the lagged effects of these negative market influences. However, there are promising signs that the some of these factors may be lifting. Argentina's modest economic recovery is expected to produce huge dividends for the local IT market, with growth expected to surpass 40% this year and next (though total spending will remain below precrisis levels). IT spending will shrink moderately in Brazil this year, as high interest rates have crimped corporate borrowing and investment. Still, the country's IT market is clearly stabilizing as investor and business confidence returns, and on this basis the market is poised to achieve respectable growth in 2004 and beyond. Technology spending is soft in Chile, but looser financial conditions and a gradual firming in the export sector will facilitate a rebound in 2004. Mexico is likely to record negative IT spending growth for 2003, but the market's contraction occurred in the first half of the year; IT spending is expected to accelerate moving forward.

Of course, there are considerable risks to the outlook. Latin America's economic recovery is contingent to a large extent on global economic developments. Mexico, in particular, will be significantly affected by economic conditions in the United States. If the expected upturn in the U.S. and world economies fails to materialize, IT investment will suffer from weak corporate cash flows. Probably more important are local financial, political, and economic considerations. As recent events in Argentina and Brazil have amply demonstrated, the region remains highly sensitive to abrupt shifts in investor sentiment. Another debt/currency crisis could easily throw the recovery off the rails. In this regard, Venezuela's political crisis shows no signs of abating and is expected to wipe an estimated 38% from that country's IT market in 2003. This is enough to put a serious dent into regional IT spending; if it continues into next year it will likely necessitate a downward revision to our Latin American IT forecast for 2004.

As recent events in Argentina and Brazil have amply demonstrated, the region remains highly sensitive to abrupt shifts in investor sentiment.

Tables 351–389 illustrate IT spending forecasts for Latin America, with country-level detail for Argentina, Brazil, Chile, Colombia, Mexico, and Venezuela.

TABLE 351

IT SPENDING IN LATIN AMERICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	780.5	757.7	840.8	936.7	1,035.1	1,142.2
Implementation	2,998.3	2,919.1	3,210.9	3,555.4	3,923.6	4,314.5
Maintenance and support	2,007.1	1,957.3	2,131.9	2,351.6	2,593.0	2,848.1
Operations	1,149.1	1,138.8	1,301.4	1,500.4	1,720.1	1,947.1
IT training and education	323.7	311.3	337.2	368.9	402.1	438.1
Services total	7,258.7	7,084.2	7,822.2	8,713.0	9,674.1	10,690.0
Packaged software						
System infrastructure software	1,113.5	1,182.0	1,283.7	1,386.9	1,495.2	1,590.9
Appl. development and deployment	1,072.0	1,128.6	1,234.5	1,352.0	1,471.2	1,573.1
Applications	1,089.9	1,139.2	1,254.9	1,391.3	1,513.9	1,618.6
Packaged software total	3,275.5	3,449.8	3,773.1	4,130.2	4,480.4	4,782.6
Hardware						
Systems						
High-end enterprise servers	438.8	355.1	364.4	378.6	389.0	401.7
Midrange enterprise servers	366.4	325.0	345.7	365.6	382.4	394.6
Volume servers	501.7	515.2	552.0	573.3	587.3	606.2
Servers total	1,306.9	1,195.3	1,262.1	1,317.4	1,358.7	1,402.6
Personal computers	7,349.6	7,080.4	7,479.7	7,865.6	8,171.2	8,437.0
Traditional workstations	125.2	105.8	96.5	92.7	77.3	88.5
Clients total	7,474.8	7,186.2	7,576.2	7,958.2	8,248.5	8,525.5
Systems total	8,781.7	8,381.6	8,838.3	9,275.6	9,607.2	9,928.0
Storage						
Disk systems	608.4	656.2	738.9	827.0	917.2	1,010.7
Tape automation	181.6	185.8	200.5	215.5	229.8	244.2
Storage total	790.0	842.0	939.4	1,042.5	1,147.0	1,254.8
Peripherals						
Printers and MFPs	1,171.4	1,208.6	1,321.2	1,450.5	1,553.8	1,686.6
Smart handheld devices	288.2	248.0	288.3	311.5	349.8	384.7
Other add-ons	147.0	152.5	183.7	212.4	243.5	273.4
Peripherals total	1,606.6	1,609.1	1,793.2	1,974.4	2,147.1	2,344.8
Networking equipment	1,683.5	1,730.4	1,834.9	1,934.5	2,051.7	2,257.6
Hardware total	12,861.8	12,563.1	13,405.8	14,227.0	14,953.1	15,785.3
Packaged software total	3,275.5	3,449.8	3,773.1	4,130.2	4,480.4	4,782.6
Services total	7,258.7	7,084.2	7,822.2	8,713.0	9,674.1	10,690.0
Total IT	23,396.0	23,097.1	25,001.0	27,070.3	29,107.5	31,257.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 352

GROWTH IN IT SPENDING IN LATIN AMERICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-2.9	11.0	11.4	10.5	10.3	10.8
Implementation	-2.6	10.0	10.7	10.4	10.0	10.3
Maintenance and support	-2.5	8.9	10.3	10.3	9.8	9.8
Operations	-0.9	14.3	15.3	14.6	13.2	14.3
IT training and education	-3.8	8.3	9.4	9.0	9.0	8.9
Services total	-2.4	10.4	11.4	11.0	10.5	10.8
Packaged software						
System infrastructure software	6.2	8.6	8.0	7.8	6.4	7.7
Appl. development and deployment	5.3	9.4	9.5	8.8	6.9	8.7
Applications	4.5	10.2	10.9	8.8	6.9	9.2
Packaged software total	5.3	9.4	9.5	8.5	6.7	8.5
Hardware						
Systems						
High-end enterprise servers	-19.1	2.6	3.9	2.8	3.3	3.1
Midrange enterprise servers	-11.3	6.4	5.8	4.6	3.2	5.0
Volume servers	2.7	7.1	3.9	2.4	3.2	4.1
Servers total	-8.5	5.6	4.4	3.1	3.2	4.1
Personal computers	-3.7	5.6	5.2	3.9	3.3	4.5
Traditional workstations	-15.4	-8.8	-4.0	-16.6	14.5	-4.4
Clients total	-3.7	5.6	5.2	3.9	3.3	4.5
Systems total	-4.6	5.4	4.9	3.6	3.3	4.3
Storage						
Disk systems	7.9	12.6	11.9	10.9	10.2	11.4
Tape automation	2.3	7.9	7.5	6.6	6.3	7.1
Storage total	6.6	11.6	11.0	10.0	9.4	10.5
Peripherals						
Printers and MFPs	3.2	9.3	9.8	7.1	8.6	8.7
Smart handheld devices	-14.0	16.2	8.1	12.3	10.0	11.6
Other add-ons	3.8	20.5	15.6	14.6	12.3	15.7
Peripherals total	0.2	11.4	10.1	8.7	9.2	9.9
Networking equipment	2.8	6.0	5.4	6.1	10.0	6.9
Hardware total	-2.3	6.7	6.1	5.1	5.6	5.9
Packaged software total	5.3	9.4	9.5	8.5	6.7	8.5
Services total	-2.4	10.4	11.4	11.0	10.5	10.8
Total IT	-1.3	8.2	8.3	7.5	7.4	7.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 353

PROPORTIONS OF IT SPENDING CATEGORIES IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.3	3.3	3.4	3.5	3.6	3.7
Implementation	12.8	12.6	12.8	13.1	13.5	13.8
Maintenance and support	8.6	8.5	8.5	8.7	8.9	9.1
Operations	4.9	4.9	5.2	5.5	5.9	6.2
IT training and education	1.4	1.3	1.3	1.4	1.4	1.4
Services total	31.0	30.7	31.3	32.2	33.2	34.2
Packaged software						
System infrastructure software	4.8	5.1	5.1	5.1	5.1	5.1
Appl. development and deployment	4.6	4.9	4.9	5.0	5.1	5.0
Applications	4.7	4.9	5.0	5.1	5.2	5.2
Packaged software total	14.0	14.9	15.1	15.3	15.4	15.3
Hardware						
Systems						
High-end enterprise servers	1.9	1.5	1.5	1.4	1.3	1.3
Midrange enterprise servers	1.6	1.4	1.4	1.4	1.3	1.3
Volume servers	2.1	2.2	2.2	2.1	2.0	1.9
Servers total	5.6	5.2	5.0	4.9	4.7	4.5
Personal computers	31.4	30.7	29.9	29.1	28.1	27.0
Traditional workstations	0.5	0.5	0.4	0.3	0.3	0.3
Clients total	31.4	30.7	29.9	29.1	28.1	27.0
Systems total	37.5	36.3	35.4	34.3	33.0	31.8
Storage						
Disk systems	2.6	2.8	3.0	3.1	3.2	3.2
Tape automation	0.8	0.8	0.8	0.8	0.8	0.8
Storage total	3.4	3.6	3.8	3.9	3.9	4.0
Peripherals						
Printers and MFPs	5.0	5.2	5.3	5.4	5.3	5.4
Smart handheld devices	1.2	1.1	1.2	1.2	1.2	1.2
Other add-ons	0.6	0.7	0.7	0.8	0.8	0.9
Peripherals total	6.9	7.0	7.2	7.3	7.4	7.5
Networking equipment	7.2	7.5	7.3	7.1	7.0	7.2
Hardware total	55.0	54.4	53.6	52.6	51.4	50.5
Packaged software total	14.0	14.9	15.1	15.3	15.4	15.3
Services total	31.0	30.7	31.3	32.2	33.2	34.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 354

LATIN AMERICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.1	2.0	2.2	2.3	2.4	2.5
Implementation	2.2	2.2	2.3	2.4	2.5	2.6
Maintenance and support	2.2	2.0	2.1	2.2	2.3	2.3
Operations	1.8	1.6	1.8	1.9	2.0	2.1
IT training and education	1.5	1.5	1.6	1.6	1.7	1.7
Services total	2.1	2.0	2.1	2.2	2.3	2.4
Packaged software						
System infrastructure software	2.4	2.5	2.5	2.5	2.5	2.5
Appl. development and deployment	2.7	2.8	2.9	3.0	3.0	2.9
Applications	1.3	1.3	1.4	1.4	1.4	1.4
Packaged software total	1.9	2.0	2.0	2.1	2.1	2.1
Hardware						
Systems						
High-end enterprise servers	3.3	3.0	3.2	3.4	3.5	3.7
Midrange enterprise servers	2.5	2.4	2.5	2.5	2.6	2.5
Volume servers	2.4	2.3	2.3	2.2	2.1	2.1
Servers total	2.7	2.5	2.5	2.6	2.5	2.5
Personal computers	4.8	4.8	5.0	5.0	5.1	5.1
Traditional workstations	5.3	6.3	7.5	8.8	8.8	11.3
Clients total	4.8	4.8	5.0	5.0	5.1	5.2
Systems total	4.3	4.3	4.4	4.4	4.5	4.5
Storage						
Disk systems	2.8	3.1	3.5	3.7	4.0	4.2
Tape automation	6.2	6.3	6.6	6.8	6.9	6.9
Storage total	3.2	3.5	3.8	4.1	4.3	4.6
Peripherals						
Printers and MFPs	2.9	2.8	2.9	3.1	3.2	3.4
Smart handheld devices	3.9	2.3	1.7	1.3	1.2	1.1
Other add-ons	1.2	1.3	1.6	1.8	1.9	2.1
Peripherals total	2.6	2.5	2.4	2.4	2.4	2.4
Networking equipment	3.3	3.5	3.5	3.4	3.3	3.3
Hardware total	3.8	3.7	3.8	3.8	3.8	3.8
Packaged software total	1.9	2.0	2.0	2.1	2.1	2.1
Services total	2.1	2.0	2.1	2.2	2.3	2.4
Total IT	2.7	2.7	2.7	2.8	2.8	2.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 355

IT SPENDING IN ARGENTINA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	54.0	65.9	91.9	120.2	145.2	175.0
Implementation	204.2	248.7	336.0	432.9	530.0	639.9
Maintenance and support	131.9	148.3	180.5	221.2	266.0	319.5
Operations	56.8	68.9	96.0	126.4	159.5	194.2
IT training and education	13.9	16.8	22.9	30.1	38.1	45.7
Services total	460.7	548.6	727.4	930.8	1,138.7	1,374.3
Packaged software						
System infrastructure software	56.6	72.4	95.7	118.4	140.8	148.4
Appl. development and deployment	51.4	68.4	93.1	116.4	138.5	149.3
Applications	64.9	82.7	112.4	131.3	155.5	161.3
Packaged software total	172.9	223.5	301.2	366.1	434.8	459.0
Hardware						
Systems						
High-end enterprise servers	7.3	12.7	16.7	14.1	14.6	14.7
Midrange enterprise servers	12.6	24.6	30.4	33.8	34.6	34.0
Volume servers	15.1	25.6	47.1	48.4	47.1	50.0
Servers total	35.0	62.8	94.2	96.3	96.3	98.7
Personal computers	129.4	299.4	486.5	617.6	740.0	805.5
Traditional workstations	1.9	3.7	5.3	6.0	5.3	4.0
Clients total	131.3	303.2	491.9	623.6	745.3	809.5
Systems total	166.3	366.0	586.1	719.9	841.6	908.2
Storage						
Disk systems	20.9	38.7	56.1	77.4	98.3	121.8
Tape automation	5.2	9.1	12.7	17.0	20.8	25.0
Storage total	26.1	47.7	68.8	94.4	119.1	146.8
Peripherals						
Printers and MFPs	14.5	32.7	65.7	97.6	119.2	148.9
Smart handheld devices	5.5	8.7	10.9	12.8	15.4	17.0
Other add-ons	2.5	6.1	11.4	16.0	21.1	25.2
Peripherals total	22.5	47.5	88.0	126.4	155.7	191.1
Networking equipment	62.8	86.6	123.5	151.5	176.2	210.3
Hardware total	277.6	547.8	866.5	1,092.1	1,292.6	1,456.4
Packaged software total	172.9	223.5	301.2	366.1	434.8	459.0
Services total	460.7	548.6	727.4	930.8	1,138.7	1,374.3
Total IT	911.3	1,320.0	1,895.0	2,389.0	2,866.1	3,289.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 356

GROWTH IN IT SPENDING IN ARGENTINA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	21.9	39.5	30.7	20.8	20.5	27.7
Implementation	21.8	35.1	28.8	22.4	20.7	26.7
Maintenance and support	12.5	21.7	22.6	20.2	20.1	21.2
Operations	21.4	39.3	31.7	26.2	21.7	29.6
IT training and education	21.1	36.5	31.3	26.4	20.2	28.4
Services total	19.1	32.6	28.0	22.3	20.7	25.8
Packaged software						
System infrastructure software	28.0	32.1	23.7	18.9	5.4	19.6
Appl. development and deployment	33.1	36.1	25.0	19.0	7.8	21.5
Applications	27.4	35.9	16.8	18.4	3.7	18.2
Packaged software total	29.3	34.8	21.5	18.8	5.6	19.7
Hardware						
Systems						
High-end enterprise servers	73.5	31.8	-15.8	3.7	0.7	3.7
Midrange enterprise servers	94.6	24.0	11.0	2.6	-1.8	8.5
Volume servers	69.7	84.1	2.9	-2.8	6.2	18.2
Servers total	79.5	50.1	2.2	0.0	2.5	12.0
Personal computers	131.4	62.5	26.9	19.8	8.9	28.1
Traditional workstations	99.8	43.5	13.0	-12.3	-24.0	2.0
Clients total	131.4	62.5	26.9	19.8	8.9	28.1
Systems total	120.1	60.2	22.8	16.9	7.9	25.5
Storage						
Disk systems	85.4	45.0	38.0	27.0	24.0	33.2
Tape automation	74.0	40.3	33.5	22.7	19.7	28.8
Storage total	83.1	44.1	37.2	26.2	23.3	32.4
Peripherals						
Printers and MFPs	126.0	100.9	48.4	22.2	24.9	46.1
Smart handheld devices	57.2	25.0	17.4	20.4	10.3	18.2
Other add-ons	144.3	87.0	41.1	31.6	19.2	42.6
Peripherals total	111.1	85.2	43.6	23.2	22.7	41.6
Networking equipment	37.9	42.7	22.6	16.3	19.4	24.8
Hardware total	97.3	58.2	26.0	18.4	12.7	27.7
Packaged software total	29.3	34.8	21.5	18.8	5.6	19.7
Services total	19.1	32.6	28.0	22.3	20.7	25.8
Total IT	44.8	43.6	26.1	20.0	14.8	25.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 357

PROPORTIONS OF IT SPENDING CATEGORIES IN ARGENTINA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.9	5.0	4.9	5.0	5.1	5.3
Implementation	22.4	18.8	17.7	18.1	18.5	19.5
Maintenance and support	14.5	11.2	9.5	9.3	9.3	9.7
Operations	6.2	5.2	5.1	5.3	5.6	5.9
IT training and education	1.5	1.3	1.2	1.3	1.3	1.4
Services total	50.6	41.6	38.4	39.0	39.7	41.8
Packaged software						
System infrastructure software	6.2	5.5	5.1	5.0	4.9	4.5
Appl. development and deployment	5.6	5.2	4.9	4.9	4.8	4.5
Applications	7.1	6.3	5.9	5.5	5.4	4.9
Packaged software total	19.0	16.9	15.9	15.3	15.2	14.0
Hardware						
Systems						
High-end enterprise servers	0.8	1.0	0.9	0.6	0.5	0.4
Midrange enterprise servers	1.4	1.9	1.6	1.4	1.2	1.0
Volume servers	1.7	1.9	2.5	2.0	1.6	1.5
Servers total	3.8	4.8	5.0	4.0	3.4	3.0
Personal computers	14.2	22.7	25.7	25.9	25.8	24.5
Traditional workstations	0.2	0.3	0.3	0.3	0.2	0.1
Clients total	14.2	22.7	25.7	25.9	25.8	24.5
Systems total	18.2	27.7	30.9	30.1	29.4	27.6
Storage						
Disk systems	2.3	2.9	3.0	3.2	3.4	3.7
Tape automation	0.6	0.7	0.7	0.7	0.7	0.8
Storage total	2.9	3.6	3.6	3.9	4.2	4.5
Peripherals						
Printers and MFPs	1.6	2.5	3.5	4.1	4.2	4.5
Smart handheld devices	0.6	0.7	0.6	0.5	0.5	0.5
Other add-ons	0.3	0.5	0.6	0.7	0.7	0.8
Peripherals total	2.5	3.6	4.6	5.3	5.4	5.8
Networking equipment	6.9	6.6	6.5	6.3	6.1	6.4
Hardware total	30.5	41.5	45.7	45.7	45.1	44.3
Packaged software total	19.0	16.9	15.9	15.3	15.2	14.0
Services total	50.6	41.6	38.4	39.0	39.7	41.8
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 358

ARGENTINA PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	6.9	8.7	10.9	12.8	14.0	15.3
Implementation	6.8	8.5	10.5	12.2	13.5	14.8
Maintenance and support	6.6	7.6	8.5	9.4	10.3	11.2
Operations	4.9	6.1	7.4	8.4	9.3	10.0
IT training and education	4.3	5.4	6.8	8.2	9.5	10.4
Services total	6.3	7.7	9.3	10.7	11.8	12.9
Packaged software						
System infrastructure software	5.1	6.1	7.5	8.5	9.4	9.3
Appl. development and deployment	4.8	6.1	7.5	8.6	9.4	9.5
Applications	6.0	7.3	9.0	9.4	10.3	10.0
Packaged software total	5.3	6.5	8.0	8.9	9.7	9.6
Hardware						
Systems						
High-end enterprise servers	1.7	3.6	4.6	3.7	3.7	3.7
Midrange enterprise servers	3.4	7.6	8.8	9.2	9.1	8.6
Volume servers	3.0	5.0	8.5	8.5	8.0	8.2
Servers total	2.7	5.3	7.5	7.3	7.1	7.0
Personal computers	1.8	4.2	6.5	7.9	9.1	9.5
Traditional workstations	1.5	3.5	5.5	6.5	6.9	4.6
Clients total	1.8	4.2	6.5	7.8	9.0	9.5
Systems total	1.9	4.4	6.6	7.8	8.8	9.1
Storage						
Disk systems	3.4	5.9	7.6	9.4	10.7	12.1
Tape automation	2.9	4.9	6.3	7.9	9.1	10.2
Storage total	3.3	5.7	7.3	9.1	10.4	11.7
Peripherals						
Printers and MFPs	1.2	2.7	5.0	6.7	7.7	8.8
Smart handheld devices	1.9	3.5	3.8	4.1	4.4	4.4
Other add-ons	1.7	4.0	6.2	7.6	8.7	9.2
Peripherals total	1.4	3.0	4.9	6.4	7.3	8.2
Networking equipment	3.7	5.0	6.7	7.8	8.6	9.3
Hardware total	2.2	4.4	6.5	7.7	8.6	9.2
Packaged software total	5.3	6.5	8.0	8.9	9.7	9.6
Services total	6.3	7.7	9.3	10.7	11.8	12.9
Total IT	3.9	5.7	7.6	8.8	9.8	10.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 359

ARGENTINA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.2	0.2	0.3	0.3	0.4
Implementation	0.2	0.2	0.2	0.3	0.3	0.4
Maintenance and support	0.1	0.2	0.2	0.2	0.2	0.3
Operations	0.1	0.1	0.1	0.2	0.2	0.2
IT training and education	0.1	0.1	0.1	0.1	0.2	0.2
Services total	0.1	0.2	0.2	0.2	0.3	0.3
Packaged software						
System infrastructure software	0.1	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.1	0.2	0.2	0.3	0.3	0.3
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.1	0.2	0.2	0.2	0.2	0.2
Volume servers	0.1	0.1	0.2	0.2	0.2	0.2
Servers total	0.1	0.1	0.2	0.2	0.2	0.2
Personal computers	0.1	0.2	0.3	0.4	0.5	0.5
Traditional workstations	0.1	0.2	0.4	0.6	0.6	0.5
Clients total	0.1	0.2	0.3	0.4	0.5	0.5
Systems total	0.1	0.2	0.3	0.3	0.4	0.4
Storage						
Disk systems	0.1	0.2	0.3	0.3	0.4	0.5
Tape automation	0.2	0.3	0.4	0.5	0.6	0.7
Storage total	0.1	0.2	0.3	0.4	0.5	0.5
Peripherals						
Printers and MFPs	0.0	0.1	0.1	0.2	0.2	0.3
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.0
Other add-ons	0.0	0.1	0.1	0.1	0.2	0.2
Peripherals total	0.0	0.1	0.1	0.2	0.2	0.2
Networking equipment	0.1	0.2	0.2	0.3	0.3	0.3
Hardware total	0.1	0.2	0.2	0.3	0.3	0.4
Packaged software total	0.1	0.1	0.2	0.2	0.2	0.2
Services total	0.1	0.2	0.2	0.2	0.3	0.3
Total IT	0.1	0.2	0.2	0.2	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 360

IT SPENDING IN BRAZIL, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	333.8	300.5	325.5	353.3	381.6	415.0
Implementation	1,319.6	1,181.4	1,272.0	1,374.1	1,478.9	1,600.9
Maintenance and support	825.1	743.1	806.8	882.8	963.8	1,051.8
Operations	436.5	403.4	455.2	519.1	589.5	665.9
IT training and education	147.5	132.3	141.1	153.8	165.0	181.1
Services total	3,062.6	2,760.6	3,000.7	3,283.0	3,578.8	3,914.6
Packaged software						
System infrastructure software	666.1	712.4	763.7	814.1	864.2	913.9
Appl. development and deployment	561.2	599.2	643.0	688.6	735.7	786.1
Applications	502.8	535.3	580.9	630.4	682.1	734.6
Packaged software total	1,730.1	1,846.9	1,987.6	2,133.1	2,282.0	2,434.6
Hardware						
Systems						
High-end enterprise servers	279.3	206.9	210.8	220.1	228.7	237.9
Midrange enterprise servers	138.5	110.2	113.7	115.7	118.8	121.1
Volume servers	200.3	195.1	197.7	198.3	199.1	200.1
Servers total	618.1	512.2	522.2	534.2	546.6	559.1
Personal computers	2,714.5	2,622.8	2,689.8	2,754.0	2,807.5	2,852.8
Traditional workstations	72.4	62.8	55.3	53.8	46.0	28.5
Clients total	2,786.9	2,685.7	2,745.1	2,807.8	2,853.5	2,881.3
Systems total	3,405.0	3,197.8	3,267.3	3,342.0	3,400.1	3,440.5
Storage						
Disk systems	253.4	271.9	294.4	316.9	338.3	357.1
Tape automation	92.9	95.7	99.6	103.5	107.0	110.3
Storage total	346.3	367.6	394.0	420.4	445.3	467.4
Peripherals						
Printers and MFPs	405.7	368.5	402.9	431.8	457.6	478.9
Smart handheld devices	89.3	68.8	76.7	75.9	82.0	87.2
Other add-ons	54.0	55.1	64.5	72.5	81.4	89.0
Peripherals total	549.0	492.3	544.1	580.1	621.0	655.1
Networking equipment	722.1	740.2	768.6	794.8	834.2	905.7
Hardware total	5,022.4	4,798.0	4,973.9	5,137.3	5,300.6	5,468.7
Packaged software total	1,730.1	1,846.9	1,987.6	2,133.1	2,282.0	2,434.6
Services total	3,062.6	2,760.6	3,000.7	3,283.0	3,578.8	3,914.6
Total IT	9,815.1	9,405.6	9,962.2	10,553.4	11,161.4	11,818.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 361

GROWTH IN IT SPENDING IN BRAZIL, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-10.0	8.3	8.5	8.0	8.8	8.4
Implementation	-10.5	7.7	8.0	7.6	8.2	7.9
Maintenance and support	-9.9	8.6	9.4	9.2	9.1	9.1
Operations	-7.6	12.8	14.1	13.6	13.0	13.4
IT training and education	-10.3	6.7	8.9	7.3	9.7	8.2
Services total	-9.9	8.7	9.4	9.0	9.4	9.1
Packaged software						
System infrastructure software	7.0	7.2	6.6	6.1	5.7	6.4
Appl. development and deployment	6.8	7.3	7.1	6.9	6.8	7.0
Applications	6.5	8.5	8.5	8.2	7.7	8.2
Packaged software total	6.8	7.6	7.3	7.0	6.7	7.2
Hardware						
Systems						
High-end enterprise servers	-25.9	1.9	4.4	3.9	4.0	3.6
Midrange enterprise servers	-20.4	3.1	1.8	2.6	2.0	2.4
Volume servers	-2.6	1.3	0.3	0.4	0.5	0.6
Servers total	-17.1	1.9	2.3	2.3	2.3	2.2
Personal computers	-3.4	2.6	2.4	1.9	1.6	2.1
Traditional workstations	-13.2	-12.0	-2.8	-14.5	-38.0	-17.9
Clients total	-3.4	2.6	2.4	1.9	1.6	2.1
Systems total	-6.1	2.2	2.3	1.7	1.2	1.8
Storage						
Disk systems	7.3	8.2	7.7	6.8	5.6	7.1
Tape automation	3.0	4.1	3.9	3.4	3.1	3.6
Storage total	6.2	7.2	6.7	5.9	5.0	6.2
Peripherals						
Printers and MFPs	-9.2	9.3	7.2	6.0	4.6	6.8
Smart handheld devices	-23.0	11.6	-1.1	8.0	6.4	6.1
Other add-ons	2.1	17.0	12.3	12.3	9.3	12.7
Peripherals total	-10.3	10.5	6.6	7.0	5.5	7.4
Networking equipment	2.5	3.8	3.4	5.0	8.6	5.2
Hardware total	-4.5	3.7	3.3	3.2	3.2	3.3
Packaged software total	6.8	7.6	7.3	7.0	6.7	7.2
Services total	-9.9	8.7	9.4	9.0	9.4	9.1
Total IT	-4.2	5.9	5.9	5.8	5.9	5.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 362

PROPORTIONS OF IT SPENDING CATEGORIES IN BRAZIL, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.4	3.2	3.3	3.3	3.4	3.5
Implementation	13.4	12.6	12.8	13.0	13.3	13.5
Maintenance and support	8.4	7.9	8.1	8.4	8.6	8.9
Operations	4.4	4.3	4.6	4.9	5.3	5.6
IT training and education	1.5	1.4	1.4	1.5	1.5	1.5
Services total	31.2	29.4	30.1	31.1	32.1	33.1
Packaged software						
System infrastructure software	6.8	7.6	7.7	7.7	7.7	7.7
Appl. development and deployment	5.7	6.4	6.5	6.5	6.6	6.7
Applications	5.1	5.7	5.8	6.0	6.1	6.2
Packaged software total	17.6	19.6	20.0	20.2	20.4	20.6
Hardware						
Systems						
High-end enterprise servers	2.8	2.2	2.1	2.1	2.0	2.0
Midrange enterprise servers	1.4	1.2	1.1	1.1	1.1	1.0
Volume servers	2.0	2.1	2.0	1.9	1.8	1.7
Servers total	6.3	5.4	5.2	5.1	4.9	4.7
Personal computers	27.7	27.9	27.0	26.1	25.2	24.1
Traditional workstations	0.7	0.7	0.6	0.5	0.4	0.2
Clients total	27.7	27.9	27.0	26.1	25.2	24.1
Systems total	34.7	34.0	32.8	31.7	30.5	29.1
Storage						
Disk systems	2.6	2.9	3.0	3.0	3.0	3.0
Tape automation	0.9	1.0	1.0	1.0	1.0	0.9
Storage total	3.5	3.9	4.0	4.0	4.0	4.0
Peripherals						
Printers and MFPs	4.1	3.9	4.0	4.1	4.1	4.1
Smart handheld devices	0.9	0.7	0.8	0.7	0.7	0.7
Other add-ons	0.6	0.6	0.6	0.7	0.7	0.8
Peripherals total	5.6	5.2	5.5	5.5	5.6	5.5
Networking equipment	7.4	7.9	7.7	7.5	7.5	7.7
Hardware total	51.2	51.0	49.9	48.7	47.5	46.3
Packaged software total	17.6	19.6	20.0	20.2	20.4	20.6
Services total	31.2	29.4	30.1	31.1	32.1	33.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 363

BRAZIL PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	42.8	39.7	38.7	37.7	36.9	36.3
Implementation	44.0	40.5	39.6	38.6	37.7	37.1
Maintenance and support	41.1	38.0	37.8	37.5	37.2	36.9
Operations	38.0	35.4	35.0	34.6	34.3	34.2
IT training and education	45.6	42.5	41.9	41.7	41.0	41.3
Services total	42.2	39.0	38.4	37.7	37.0	36.6
Packaged software						
System infrastructure software	59.8	60.3	59.5	58.7	57.8	57.4
Appl. development and deployment	52.4	53.1	52.1	50.9	50.0	50.0
Applications	46.1	47.0	46.3	45.3	45.1	45.4
Packaged software total	52.8	53.5	52.7	51.6	50.9	50.9
Hardware						
Systems						
High-end enterprise servers	63.6	58.3	57.8	58.2	58.8	59.2
Midrange enterprise servers	37.8	33.9	32.9	31.7	31.1	30.7
Volume servers	39.9	37.9	35.8	34.6	33.9	33.0
Servers total	47.3	42.8	41.4	40.5	40.2	39.9
Personal computers	36.9	37.0	36.0	35.0	34.4	33.8
Traditional workstations	57.8	59.4	57.3	58.0	59.5	32.2
Clients total	37.3	37.4	36.2	35.3	34.6	33.8
Systems total	38.8	38.2	37.0	36.0	35.4	34.7
Storage						
Disk systems	41.7	41.4	39.8	38.3	36.9	35.3
Tape automation	51.1	51.5	49.7	48.0	46.6	45.2
Storage total	43.8	43.7	41.9	40.3	38.8	37.2
Peripherals						
Printers and MFPs	34.6	30.5	30.5	29.8	29.5	28.4
Smart handheld devices	31.0	27.7	26.6	24.4	23.4	22.7
Other add-ons	36.7	36.1	35.1	34.1	33.4	32.5
Peripherals total	34.2	30.6	30.3	29.4	28.9	27.9
Networking equipment	42.9	42.8	41.9	41.1	40.7	40.1
Hardware total	39.0	38.2	37.1	36.1	35.4	34.6
Packaged software total	52.8	53.5	52.7	51.6	50.9	50.9
Services total	42.2	39.0	38.4	37.7	37.0	36.6
Total IT	42.0	40.7	39.8	39.0	38.3	37.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 364

BRAZIL PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.9	0.8	0.9	0.9	0.9	0.9
Implementation	1.0	0.9	0.9	0.9	0.9	1.0
Maintenance and support	0.9	0.8	0.8	0.8	0.8	0.9
Operations	0.7	0.6	0.6	0.6	0.7	0.7
IT training and education	0.7	0.6	0.7	0.7	0.7	0.7
Services total	0.9	0.8	0.8	0.8	0.8	0.9
Packaged software						
System infrastructure software	1.5	1.5	1.5	1.5	1.5	1.4
Appl. development and deployment	1.4	1.5	1.5	1.5	1.5	1.5
Applications	0.6	0.6	0.6	0.6	0.6	0.6
Packaged software total	1.0	1.0	1.1	1.1	1.1	1.1
Hardware						
Systems						
High-end enterprise servers	2.1	1.8	1.8	2.0	2.0	2.2
Midrange enterprise servers	0.9	0.8	0.8	0.8	0.8	0.8
Volume servers	1.0	0.9	0.8	0.8	0.7	0.7
Servers total	1.3	1.1	1.1	1.0	1.0	1.0
Personal computers	1.8	1.8	1.8	1.8	1.8	1.7
Traditional workstations	3.1	3.8	4.3	5.1	5.2	3.7
Clients total	1.8	1.8	1.8	1.8	1.8	1.7
Systems total	1.7	1.6	1.6	1.6	1.6	1.6
Storage						
Disk systems	1.2	1.3	1.4	1.4	1.5	1.5
Tape automation	3.2	3.2	3.3	3.2	3.2	3.1
Storage total	1.4	1.5	1.6	1.7	1.7	1.7
Peripherals						
Printers and MFPs	1.0	0.9	0.9	0.9	0.9	1.0
Smart handheld devices	1.2	0.6	0.5	0.3	0.3	0.2
Other add-ons	0.4	0.5	0.5	0.6	0.6	0.7
Peripherals total	0.9	0.7	0.7	0.7	0.7	0.7
Networking equipment	1.4	1.5	1.5	1.4	1.3	1.3
Hardware total	1.5	1.4	1.4	1.4	1.3	1.3
Packaged software total	1.0	1.0	1.1	1.1	1.1	1.1
Services total	0.9	0.8	0.8	0.8	0.8	0.9
Total IT	1.1	1.1	1.1	1.1	1.1	1.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 365

IT SPENDING IN CHILE, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	37.1	38.5	41.2	44.1	47.3	50.8
Implementation	148.0	156.0	168.3	181.8	197.1	214.1
Maintenance and support	100.5	105.3	112.7	120.9	131.3	143.3
Operations	77.4	81.9	88.0	95.0	103.4	113.5
IT training and education	21.7	22.1	23.7	24.8	26.3	27.9
Services total	384.6	403.8	433.9	466.6	505.4	549.6
Packaged software						
System infrastructure software	27.0	28.3	30.3	33.1	35.8	37.6
Appl. development and deployment	32.5	35.0	37.5	39.6	41.6	44.2
Applications	68.2	71.2	76.6	83.3	89.6	93.2
Packaged software total	127.7	134.6	144.5	155.9	167.0	175.0
Hardware						
Systems						
High-end enterprise servers	14.0	8.6	7.3	6.1	6.0	6.1
Midrange enterprise servers	16.8	16.9	17.6	18.0	18.4	18.7
Volume servers	21.5	21.2	22.2	22.9	23.8	24.5
Servers total	52.3	46.7	47.1	47.0	48.2	49.2
Personal computers	319.7	326.8	334.9	345.8	359.3	369.4
Traditional workstations	2.2	2.1	2.1	2.1	2.0	1.1
Clients total	321.9	328.9	337.1	347.9	361.4	370.5
Systems total	374.2	375.7	384.2	394.9	409.6	419.7
Storage						
Disk systems	16.8	18.5	20.3	22.2	24.2	26.1
Tape automation	4.2	4.3	4.6	4.9	5.1	5.3
Storage total	21.0	22.9	24.9	27.0	29.3	31.4
Peripherals						
Printers and MFPs	75.8	58.3	63.2	68.8	70.2	75.1
Smart handheld devices	7.4	8.1	9.2	9.2	10.6	11.8
Other add-ons	6.7	7.0	8.2	9.3	10.6	11.8
Peripherals total	89.9	73.4	80.5	87.4	91.3	98.6
Networking equipment	74.2	76.7	78.8	81.0	85.3	92.5
Hardware total	559.3	548.6	568.4	590.3	615.5	642.3
Packaged software total	127.7	134.6	144.5	155.9	167.0	175.0
Services total	384.6	403.8	433.9	466.6	505.4	549.6
Total IT	1,071.6	1,087.0	1,146.8	1,212.8	1,287.9	1,366.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 366

GROWTH IN IT SPENDING IN CHILE, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	3.9	7.0	7.1	7.3	7.3	7.1
Implementation	5.4	7.9	8.0	8.4	8.7	8.2
Maintenance and support	4.8	7.0	7.3	8.6	9.2	8.0
Operations	5.8	7.5	8.0	8.9	9.8	8.5
IT training and education	2.0	7.2	4.5	6.2	6.1	6.0
Services total	5.0	7.5	7.5	8.3	8.8	8.0
Packaged software						
System infrastructure software	4.7	7.1	9.1	8.3	5.0	7.4
Appl. development and deployment	7.7	7.1	5.5	5.0	6.3	6.0
Applications	4.4	7.6	8.7	7.6	4.0	7.0
Packaged software total	5.3	7.4	7.9	7.1	4.8	6.8
Hardware						
Systems						
High-end enterprise servers	-38.2	-14.9	-16.9	-1.3	1.0	-8.3
Midrange enterprise servers	0.5	4.3	2.1	2.3	1.6	2.6
Volume servers	-1.5	4.5	3.5	3.5	3.0	3.6
Servers total	-10.6	0.9	-0.2	2.4	2.2	1.3
Personal computers	2.2	2.5	3.2	3.9	2.8	3.1
Traditional workstations	-0.9	-1.9	-1.8	-1.1	-45.9	-15.3
Clients total	2.2	2.5	3.2	3.9	2.8	3.1
Systems total	0.4	2.3	2.8	3.7	2.5	2.8
Storage						
Disk systems	10.0	9.5	9.3	9.0	8.0	8.9
Tape automation	3.2	6.0	5.7	5.3	4.3	5.3
Storage total	8.6	8.8	8.6	8.3	7.3	8.3
Peripherals						
Printers and MFPs	-23.0	8.3	8.9	2.0	7.0	6.5
Smart handheld devices	9.0	13.5	0.9	14.4	11.3	9.9
Other add-ons	4.7	17.4	13.7	13.9	11.3	14.0
Peripherals total	-18.3	9.7	8.5	4.6	8.0	7.7
Networking equipment	3.4	2.8	2.8	5.3	8.5	4.8
Hardware total	-1.9	3.6	3.9	4.3	4.4	4.0
Packaged software total	5.3	7.4	7.9	7.1	4.8	6.8
Services total	5.0	7.5	7.5	8.3	8.8	8.0
Total IT	1.4	5.5	5.8	6.2	6.1	5.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 367

PROPORTIONS OF IT SPENDING CATEGORIES IN CHILE, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.5	3.5	3.6	3.6	3.7	3.7
Implementation	13.8	14.3	14.7	15.0	15.3	15.7
Maintenance and support	9.4	9.7	9.8	10.0	10.2	10.5
Operations	7.2	7.5	7.7	7.8	8.0	8.3
IT training and education	2.0	2.0	2.1	2.0	2.0	2.0
Services total	35.9	37.1	37.8	38.5	39.2	40.2
Packaged software						
System infrastructure software	2.5	2.6	2.6	2.7	2.8	2.8
Appl. development and deployment	3.0	3.2	3.3	3.3	3.2	3.2
Applications	6.4	6.6	6.7	6.9	7.0	6.8
Packaged software total	11.9	12.4	12.6	12.9	13.0	12.8
Hardware						
Systems						
High-end enterprise servers	1.3	0.8	0.6	0.5	0.5	0.4
Midrange enterprise servers	1.6	1.6	1.5	1.5	1.4	1.4
Volume servers	2.0	2.0	1.9	1.9	1.8	1.8
Servers total	4.9	4.3	4.1	3.9	3.7	3.6
Personal computers	29.8	30.1	29.2	28.5	27.9	27.0
Traditional workstations	0.2	0.2	0.2	0.2	0.2	0.1
Clients total	29.8	30.1	29.2	28.5	27.9	27.0
Systems total	34.9	34.6	33.5	32.6	31.8	30.7
Storage						
Disk systems	1.6	1.7	1.8	1.8	1.9	1.9
Tape automation	0.4	0.4	0.4	0.4	0.4	0.4
Storage total	2.0	2.1	2.2	2.2	2.3	2.3
Peripherals						
Printers and MFPs	7.1	5.4	5.5	5.7	5.4	5.5
Smart handheld devices	0.7	0.7	0.8	0.8	0.8	0.9
Other add-ons	0.6	0.6	0.7	0.8	0.8	0.9
Peripherals total	8.4	6.8	7.0	7.2	7.1	7.2
Networking equipment	6.9	7.1	6.9	6.7	6.6	6.8
Hardware total	52.2	50.5	49.6	48.7	47.8	47.0
Packaged software total	11.9	12.4	12.6	12.9	13.0	12.8
Services total	35.9	37.1	37.8	38.5	39.2	40.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 368

CHILE PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.8	5.1	4.9	4.7	4.6	4.4
Implementation	4.9	5.3	5.2	5.1	5.0	5.0
Maintenance and support	5.0	5.4	5.3	5.1	5.1	5.0
Operations	6.7	7.2	6.8	6.3	6.0	5.8
IT training and education	6.7	7.1	7.0	6.7	6.5	6.4
Services total	5.3	5.7	5.5	5.4	5.2	5.1
Packaged software						
System infrastructure software	2.4	2.4	2.4	2.4	2.4	2.4
Appl. development and deployment	3.0	3.1	3.0	2.9	2.8	2.8
Applications	6.3	6.3	6.1	6.0	5.9	5.8
Packaged software total	3.9	3.9	3.8	3.8	3.7	3.7
Hardware						
Systems						
High-end enterprise servers	3.2	2.4	2.0	1.6	1.5	1.5
Midrange enterprise servers	4.6	5.2	5.1	4.9	4.8	4.7
Volume servers	4.3	4.1	4.0	4.0	4.0	4.0
Servers total	4.0	3.9	3.7	3.6	3.5	3.5
Personal computers	4.4	4.6	4.5	4.4	4.4	4.4
Traditional workstations	1.7	2.0	2.2	2.2	2.7	1.3
Clients total	4.3	4.6	4.4	4.4	4.4	4.3
Systems total	4.3	4.5	4.3	4.3	4.3	4.2
Storage						
Disk systems	2.8	2.8	2.7	2.7	2.6	2.6
Tape automation	2.3	2.3	2.3	2.3	2.2	2.2
Storage total	2.7	2.7	2.6	2.6	2.6	2.5
Peripherals						
Printers and MFPs	6.5	4.8	4.8	4.7	4.5	4.5
Smart handheld devices	2.6	3.3	3.2	3.0	3.0	3.1
Other add-ons	4.5	4.6	4.5	4.4	4.4	4.3
Peripherals total	5.6	4.6	4.5	4.4	4.3	4.2
Networking equipment	4.4	4.4	4.3	4.2	4.2	4.1
Hardware total	4.3	4.4	4.2	4.1	4.1	4.1
Packaged software total	3.9	3.9	3.8	3.8	3.7	3.7
Services total	5.3	5.7	5.5	5.4	5.2	5.1
Total IT	4.6	4.7	4.6	4.5	4.4	4.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 369

CHILE PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.1	0.1	0.1	0.1	0.1	0.1
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.1	0.1	0.1	0.1	0.1	0.1
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.2	0.2	0.2	0.2	0.2	0.2
Traditional workstations	0.1	0.1	0.2	0.2	0.2	0.1
Clients total	0.2	0.2	0.2	0.2	0.2	0.2
Systems total	0.2	0.2	0.2	0.2	0.2	0.2
Storage						
Disk systems	0.1	0.1	0.1	0.1	0.1	0.1
Tape automation	0.1	0.1	0.2	0.2	0.2	0.2
Storage total	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.2	0.1	0.1	0.1	0.1	0.2
Smart handheld devices	0.1	0.1	0.1	0.0	0.0	0.0
Other add-ons	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.2	0.2	0.1	0.1	0.1
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 370

IT SPENDING IN COLOMBIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	67.8	76.0	84.9	94.3	103.9	114.3
Implementation	214.7	237.1	262.7	290.1	317.6	346.9
Maintenance and support	141.6	161.6	183.2	206.9	231.0	256.9
Operations	86.7	104.4	121.5	141.0	163.5	188.3
IT training and education	21.7	24.8	27.8	30.6	33.6	36.7
Services total	532.5	603.9	680.0	762.9	849.7	943.1
Packaged software						
System infrastructure software	29.0	30.7	33.3	37.0	40.9	43.4
Appl. development and deployment	55.3	57.5	61.8	68.1	74.9	78.2
Applications	97.8	106.4	117.7	132.2	143.4	151.2
Packaged software total	182.1	194.6	212.8	237.3	259.2	272.8
Hardware						
Systems						
High-end enterprise servers	10.4	7.3	5.4	5.7	5.8	6.0
Midrange enterprise servers	15.8	16.3	17.6	19.0	20.4	21.8
Volume servers	37.5	38.3	40.0	41.7	43.4	45.2
Servers total	63.7	62.0	62.9	66.3	69.6	72.9
Personal computers	379.8	374.3	392.6	394.7	359.0	361.4
Traditional workstations	5.0	4.4	4.1	3.8	3.0	14.5
Clients total	384.7	378.7	396.7	398.5	362.0	375.9
Systems total	448.4	440.7	459.6	464.8	431.6	448.8
Storage						
Disk systems	28.1	33.1	38.4	43.8	49.1	54.0
Tape automation	7.0	7.8	8.7	9.6	10.4	11.1
Storage total	35.1	40.9	47.2	53.4	59.5	65.0
Peripherals						
Printers and MFPs	49.9	83.4	91.6	100.9	103.4	108.4
Smart handheld devices	13.3	12.5	14.0	15.2	17.5	19.8
Other add-ons	7.4	8.4	10.0	11.2	11.6	13.0
Peripherals total	70.6	104.2	115.6	127.4	132.5	141.2
Networking equipment	100.3	103.4	104.6	108.8	115.3	126.0
Hardware total	654.3	689.2	727.1	754.4	738.9	781.0
Packaged software total	182.1	194.6	212.8	237.3	259.2	272.8
Services total	532.5	603.9	680.0	762.9	849.7	943.1
Total IT	1,369.0	1,487.7	1,619.9	1,754.6	1,847.7	1,996.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 371

GROWTH IN IT SPENDING IN COLOMBIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	12.1	11.7	11.1	10.2	10.0	10.8
Implementation	10.4	10.8	10.4	9.5	9.2	10.0
Maintenance and support	14.1	13.4	13.0	11.6	11.2	12.3
Operations	20.4	16.3	16.1	16.0	15.1	15.9
IT training and education	14.4	11.8	10.2	9.8	9.2	10.2
Services total	13.4	12.6	12.2	11.4	11.0	11.8
Packaged software						
System infrastructure software	6.0	8.4	11.0	10.6	6.1	9.0
Appl. development and deployment	4.0	7.5	10.2	9.9	4.5	8.0
Applications	8.7	10.6	12.3	8.5	5.4	9.2
Packaged software total	6.8	9.4	11.5	9.2	5.3	8.8
Hardware						
Systems						
High-end enterprise servers	-29.5	-27.1	5.6	2.2	3.4	-5.0
Midrange enterprise servers	3.5	7.6	8.0	7.5	6.8	7.5
Volume servers	2.3	4.3	4.1	4.1	4.1	4.2
Servers total	-2.6	1.5	5.3	4.9	4.8	4.1
Personal computers	-1.4	4.9	0.5	-9.0	0.7	-0.9
Traditional workstations	-11.8	-7.3	-7.1	-20.9	383.3	34.7
Clients total	-1.4	4.9	0.5	-9.0	0.7	-0.9
Systems total	-1.7	4.3	1.1	-7.1	4.0	0.5
Storage						
Disk systems	18.0	16.0	14.0	12.0	10.0	13.0
Tape automation	10.7	12.3	10.2	8.2	6.2	9.2
Storage total	16.5	15.3	13.3	11.3	9.3	12.3
Peripherals						
Printers and MFPs	67.0	9.9	10.2	2.4	4.9	6.8
Smart handheld devices	-6.2	12.3	8.9	15.1	12.9	12.3
Other add-ons	13.6	20.0	12.0	3.0	12.3	11.6
Peripherals total	47.6	11.0	10.2	4.0	6.6	7.9
Networking equipment	3.1	1.2	4.0	6.0	9.2	5.1
Hardware total	5.3	5.5	3.8	-2.1	5.7	3.2
Packaged software total	6.8	9.4	11.5	9.2	5.3	8.8
Services total	13.4	12.6	12.2	11.4	11.0	11.8
Total IT	8.7	8.9	8.3	5.3	8.1	7.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 372

PROPORTIONS OF IT SPENDING CATEGORIES IN COLOMBIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	5.0	5.1	5.2	5.4	5.6	5.7
Implementation	15.7	15.9	16.2	16.5	17.2	17.4
Maintenance and support	10.3	10.9	11.3	11.8	12.5	12.9
Operations	6.3	7.0	7.5	8.0	8.9	9.4
IT training and education	1.6	1.7	1.7	1.7	1.8	1.8
Services total	38.9	40.6	42.0	43.5	46.0	47.2
Packaged software						
System infrastructure software	2.1	2.1	2.1	2.1	2.2	2.2
Appl. development and deployment	4.0	3.9	3.8	3.9	4.1	3.9
Applications	7.1	7.2	7.3	7.5	7.8	7.6
Packaged software total	13.3	13.1	13.1	13.5	14.0	13.7
Hardware						
Systems						
High-end enterprise servers	0.8	0.5	0.3	0.3	0.3	0.3
Midrange enterprise servers	1.2	1.1	1.1	1.1	1.1	1.1
Volume servers	2.7	2.6	2.5	2.4	2.3	2.3
Servers total	4.7	4.2	3.9	3.8	3.8	3.7
Personal computers	27.7	25.2	24.2	22.5	19.4	18.1
Traditional workstations	0.4	0.3	0.3	0.2	0.2	0.7
Clients total	27.7	25.2	24.2	22.5	19.4	18.1
Systems total	32.8	29.6	28.4	26.5	23.4	22.5
Storage						
Disk systems	2.1	2.2	2.4	2.5	2.7	2.7
Tape automation	0.5	0.5	0.5	0.5	0.6	0.6
Storage total	2.6	2.7	2.9	3.0	3.2	3.3
Peripherals						
Printers and MFPs	3.6	5.6	5.7	5.8	5.6	5.4
Smart handheld devices	1.0	0.8	0.9	0.9	0.9	1.0
Other add-ons	0.5	0.6	0.6	0.6	0.6	0.7
Peripherals total	5.2	7.0	7.1	7.3	7.2	7.1
Networking equipment	7.3	6.9	6.5	6.2	6.2	6.3
Hardware total	47.8	46.3	44.9	43.0	40.0	39.1
Packaged software total	13.3	13.1	13.1	13.5	14.0	13.7
Services total	38.9	40.6	42.0	43.5	46.0	47.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 373

COLOMBIA PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	8.7	10.0	10.1	10.1	10.0	10.0
Implementation	7.2	8.1	8.2	8.2	8.1	8.0
Maintenance and support	7.1	8.3	8.6	8.8	8.9	9.0
Operations	7.5	9.2	9.3	9.4	9.5	9.7
IT training and education	6.7	8.0	8.2	8.3	8.4	8.4
Services total	7.3	8.5	8.7	8.8	8.8	8.8
Packaged software						
System infrastructure software	2.6	2.6	2.6	2.7	2.7	2.7
Appl. development and deployment	5.2	5.1	5.0	5.0	5.1	5.0
Applications	9.0	9.3	9.4	9.5	9.5	9.3
Packaged software total	5.6	5.6	5.6	5.7	5.8	5.7
Hardware						
Systems						
High-end enterprise servers	2.4	2.1	1.5	1.5	1.5	1.5
Midrange enterprise servers	4.3	5.0	5.1	5.2	5.3	5.5
Volume servers	7.5	7.4	7.2	7.3	7.4	7.4
Servers total	4.9	5.2	5.0	5.0	5.1	5.2
Personal computers	5.2	5.3	5.2	5.0	4.4	4.3
Traditional workstations	4.0	4.1	4.2	4.1	3.9	16.3
Clients total	5.1	5.3	5.2	5.0	4.4	4.4
Systems total	5.1	5.3	5.2	5.0	4.5	4.5
Storage						
Disk systems	4.6	5.0	5.2	5.3	5.3	5.3
Tape automation	3.9	4.2	4.4	4.5	4.5	4.5
Storage total	4.4	4.9	5.0	5.1	5.2	5.2
Peripherals						
Printers and MFPs	4.3	6.9	6.9	7.0	6.7	6.4
Smart handheld devices	4.6	5.0	4.8	4.9	5.0	5.1
Other add-ons	5.0	5.5	5.5	5.3	4.8	4.8
Peripherals total	4.4	6.5	6.4	6.5	6.2	6.0
Networking equipment	6.0	6.0	5.7	5.6	5.6	5.6
Hardware total	5.1	5.5	5.4	5.3	4.9	4.9
Packaged software total	5.6	5.6	5.6	5.7	5.8	5.7
Services total	7.3	8.5	8.7	8.8	8.8	8.8
Total IT	5.9	6.4	6.5	6.5	6.3	6.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 374

COLOMBIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.2	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.1	0.2	0.2	0.2	0.2	0.2
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.2	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.0	0.1	0.1	0.1
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.2	0.2	0.2	0.2	0.2	0.2
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.2	0.3	0.3	0.3	0.2	0.2
Traditional workstations	0.2	0.3	0.3	0.4	0.3	1.9
Clients total	0.2	0.3	0.3	0.3	0.2	0.2
Systems total	0.2	0.2	0.2	0.2	0.2	0.2
Storage						
Disk systems	0.1	0.2	0.2	0.2	0.2	0.2
Tape automation	0.2	0.3	0.3	0.3	0.3	0.3
Storage total	0.1	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.1	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.2	0.1	0.1	0.1	0.1	0.1
Other add-ons	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals total	0.1	0.2	0.2	0.2	0.1	0.1
Networking equipment	0.2	0.2	0.2	0.2	0.2	0.2
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.2	0.2	0.2	0.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 375

IT SPENDING IN MEXICO, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	193.6	198.3	215.1	234.2	255.8	277.4
Implementation	783.4	803.8	867.8	943.8	1,028.7	1,113.6
Maintenance and support	550.1	575.8	615.6	663.3	714.4	766.6
Operations	266.3	304.0	347.3	399.6	454.3	507.9
IT training and education	83.2	83.3	87.5	92.6	98.2	103.1
Services total	1,876.7	1,965.2	2,133.3	2,333.5	2,551.4	2,768.6
Packaged software						
System infrastructure software	240.4	249.3	261.6	269.0	280.9	301.9
Appl. development and deployment	190.6	198.4	208.4	218.4	227.4	244.4
Applications	250.5	256.3	265.3	284.3	293.5	314.2
Packaged software total	681.5	704.0	735.3	771.7	801.8	860.5
Hardware						
Systems						
High-end enterprise servers	74.7	81.3	84.5	88.4	88.5	89.8
Midrange enterprise servers	109.7	96.5	101.7	106.6	112.7	117.7
Volume servers	112.2	116.6	122.3	128.6	134.2	139.6
Servers total	296.5	294.4	308.4	323.6	335.4	347.1
Personal computers	2,458.3	2,296.1	2,391.2	2,518.3	2,624.1	2,743.3
Traditional workstations	11.9	8.8	7.3	6.0	2.7	27.4
Clients total	2,470.3	2,304.9	2,398.5	2,524.3	2,626.8	2,770.7
Systems total	2,766.8	2,599.3	2,706.9	2,847.9	2,962.2	3,117.8
Storage						
Disk systems	156.6	170.7	189.5	207.5	226.2	244.3
Tape automation	39.2	40.1	43.0	45.6	48.0	50.0
Storage total	195.8	210.8	232.6	253.1	274.2	294.4
Peripherals						
Printers and MFPs	375.8	373.8	388.3	413.5	448.9	490.1
Smart handheld devices	148.7	126.3	151.7	169.9	193.0	215.0
Other add-ons	49.3	49.5	58.8	67.9	78.4	89.7
Peripherals total	573.8	549.6	598.8	651.3	720.3	794.8
Networking equipment	464.3	476.3	495.0	513.4	535.5	582.8
Hardware total	4,000.7	3,836.1	4,033.2	4,265.6	4,492.3	4,789.7
Packaged software total	681.5	704.0	735.3	771.7	801.8	860.5
Services total	1,876.7	1,965.2	2,133.3	2,333.5	2,551.4	2,768.6
Total IT	6,558.9	6,505.4	6,901.8	7,370.8	7,845.5	8,418.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 376

GROWTH IN IT SPENDING IN MEXICO, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	2.4	8.5	8.9	9.2	8.5	8.8
Implementation	2.6	8.0	8.8	9.0	8.3	8.5
Maintenance and support	4.7	6.9	7.7	7.7	7.3	7.4
Operations	14.1	14.2	15.1	13.7	11.8	13.7
IT training and education	0.1	5.0	5.9	6.0	5.0	5.5
Services total	4.7	8.5	9.4	9.3	8.5	8.9
Packaged software						
System infrastructure software	3.7	4.9	2.8	4.4	7.5	4.9
Appl. development and deployment	4.1	5.0	4.8	4.1	7.5	5.4
Applications	2.3	3.5	7.2	3.2	7.1	5.2
Packaged software total	3.3	4.4	5.0	3.9	7.3	5.1
Hardware						
Systems						
High-end enterprise servers	8.8	3.9	4.7	0.1	1.4	2.5
Midrange enterprise servers	-12.0	5.3	4.8	5.8	4.4	5.1
Volume servers	4.0	4.8	5.2	4.3	4.0	4.6
Servers total	-0.7	4.7	4.9	3.7	3.5	4.2
Personal computers	-6.6	4.1	5.3	4.2	4.5	4.5
Traditional workstations	-26.0	-17.2	-18.2	-55.2	922.8	32.7
Clients total	-6.6	4.1	5.3	4.2	4.5	4.5
Systems total	-6.1	4.1	5.2	4.0	5.3	4.7
Storage						
Disk systems	9.0	11.0	9.5	9.0	8.0	9.4
Tape automation	2.3	7.4	5.9	5.3	4.3	5.7
Storage total	7.7	10.3	8.8	8.3	7.3	8.7
Peripherals						
Printers and MFPs	-0.5	3.9	6.5	8.6	9.2	7.0
Smart handheld devices	-15.1	20.1	12.0	13.6	11.4	14.2
Other add-ons	0.5	18.7	15.6	15.5	14.4	16.0
Peripherals total	-4.2	8.9	8.8	10.6	10.3	9.7
Networking equipment	2.6	3.9	3.7	4.3	8.8	5.2
Hardware total	-4.1	5.1	5.8	5.3	6.6	5.7
Packaged software total	3.3	4.4	5.0	3.9	7.3	5.1
Services total	4.7	8.5	9.4	9.3	8.5	8.9
Total IT	-0.8	6.1	6.8	6.4	7.3	6.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 377

PROPORTIONS OF IT SPENDING CATEGORIES IN MEXICO, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.0	3.0	3.1	3.2	3.3	3.3
Implementation	11.9	12.4	12.6	12.8	13.1	13.2
Maintenance and support	8.4	8.9	8.9	9.0	9.1	9.1
Operations	4.1	4.7	5.0	5.4	5.8	6.0
IT training and education	1.3	1.3	1.3	1.3	1.3	1.2
Services total	28.6	30.2	30.9	31.7	32.5	32.9
Packaged software						
System infrastructure software	3.7	3.8	3.8	3.6	3.6	3.6
Appl. development and deployment	2.9	3.0	3.0	3.0	2.9	2.9
Applications	3.8	3.9	3.8	3.9	3.7	3.7
Packaged software total	10.4	10.8	10.7	10.5	10.2	10.2
Hardware						
Systems						
High-end enterprise servers	1.1	1.2	1.2	1.2	1.1	1.1
Midrange enterprise servers	1.7	1.5	1.5	1.4	1.4	1.4
Volume servers	1.7	1.8	1.8	1.7	1.7	1.7
Servers total	4.5	4.5	4.5	4.4	4.3	4.1
Personal computers	37.5	35.3	34.6	34.2	33.4	32.6
Traditional workstations	0.2	0.1	0.1	0.1	0.0	0.3
Clients total	37.5	35.3	34.6	34.2	33.4	32.6
Systems total	42.2	40.0	39.2	38.6	37.8	37.0
Storage						
Disk systems	2.4	2.6	2.7	2.8	2.9	2.9
Tape automation	0.6	0.6	0.6	0.6	0.6	0.6
Storage total	3.0	3.2	3.4	3.4	3.5	3.5
Peripherals						
Printers and MFPs	5.7	5.7	5.6	5.6	5.7	5.8
Smart handheld devices	2.3	1.9	2.2	2.3	2.5	2.6
Other add-ons	0.8	0.8	0.9	0.9	1.0	1.1
Peripherals total	8.7	8.4	8.7	8.8	9.2	9.4
Networking equipment	7.1	7.3	7.2	7.0	6.8	6.9
Hardware total	61.0	59.0	58.4	57.9	57.3	56.9
Packaged software total	10.4	10.8	10.7	10.5	10.2	10.2
Services total	28.6	30.2	30.9	31.7	32.5	32.9
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 378

MEXICO PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	24.8	26.2	25.6	25.0	24.7	24.3
Implementation	26.1	27.5	27.0	26.5	26.2	25.8
Maintenance and support	27.4	29.4	28.9	28.2	27.6	26.9
Operations	23.2	26.7	26.7	26.6	26.4	26.1
IT training and education	25.7	26.8	25.9	25.1	24.4	23.5
Services total	25.9	27.7	27.3	26.8	26.4	25.9
Packaged software						
System infrastructure software	21.6	21.1	20.4	19.4	18.8	19.0
Appl. development and deployment	17.8	17.6	16.9	16.2	15.5	15.5
Applications	23.0	22.5	21.1	20.4	19.4	19.4
Packaged software total	20.8	20.4	19.5	18.7	17.9	18.0
Hardware						
Systems						
High-end enterprise servers	17.0	22.9	23.2	23.4	22.8	22.3
Midrange enterprise servers	29.9	29.7	29.4	29.2	29.5	29.8
Volume servers	22.4	22.6	22.1	22.4	22.8	23.0
Servers total	22.7	24.6	24.4	24.6	24.7	24.7
Personal computers	33.4	32.4	32.0	32.0	32.1	32.5
Traditional workstations	9.5	8.4	7.6	6.5	3.5	31.0
Clients total	33.0	32.1	31.7	31.7	31.8	32.5
Systems total	31.5	31.0	30.6	30.7	30.8	31.4
Storage						
Disk systems	25.7	26.0	25.7	25.1	24.7	24.2
Tape automation	21.6	21.6	21.5	21.1	20.9	20.5
Storage total	24.8	25.0	24.8	24.3	23.9	23.5
Peripherals						
Printers and MFPs	32.1	30.9	29.4	28.5	28.9	29.1
Smart handheld devices	51.6	50.9	52.6	54.5	55.2	55.9
Other add-ons	33.5	32.5	32.0	32.0	32.2	32.8
Peripherals total	35.7	34.2	33.4	33.0	33.5	33.9
Networking equipment	27.6	27.5	27.0	26.5	26.1	25.8
Hardware total	31.1	30.5	30.1	30.0	30.0	30.3
Packaged software total	20.8	20.4	19.5	18.7	17.9	18.0
Services total	25.9	27.7	27.3	26.8	26.4	25.9
Total IT	28.0	28.2	27.6	27.2	27.0	26.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 379

MEXICO PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.5	0.6	0.6	0.6	0.6
Implementation	0.6	0.6	0.6	0.6	0.7	0.7
Maintenance and support	0.6	0.6	0.6	0.6	0.6	0.6
Operations	0.4	0.4	0.5	0.5	0.5	0.5
IT training and education	0.4	0.4	0.4	0.4	0.4	0.4
Services total	0.5	0.5	0.6	0.6	0.6	0.6
Packaged software						
System infrastructure software	0.5	0.5	0.5	0.5	0.5	0.5
Appl. development and deployment	0.5	0.5	0.5	0.5	0.5	0.5
Applications	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.4	0.4	0.4	0.4	0.4	0.4
Hardware						
Systems						
High-end enterprise servers	0.6	0.7	0.7	0.8	0.8	0.8
Midrange enterprise servers	0.7	0.7	0.7	0.7	0.8	0.8
Volume servers	0.5	0.5	0.5	0.5	0.5	0.5
Servers total	0.6	0.6	0.6	0.6	0.6	0.6
Personal computers	1.6	1.6	1.6	1.6	1.6	1.7
Traditional workstations	0.5	0.5	0.6	0.6	0.3	3.5
Clients total	1.6	1.6	1.6	1.6	1.6	1.7
Systems total	1.3	1.3	1.3	1.4	1.4	1.4
Storage						
Disk systems	0.7	0.8	0.9	0.9	1.0	1.0
Tape automation	1.3	1.4	1.4	1.4	1.4	1.4
Storage total	0.8	0.9	1.0	1.0	1.0	1.1
Peripherals						
Printers and MFPs	0.9	0.9	0.9	0.9	0.9	1.0
Smart handheld devices	2.0	1.2	0.9	0.7	0.7	0.6
Other add-ons	0.4	0.4	0.5	0.6	0.6	0.7
Peripherals total	0.9	0.8	0.8	0.8	0.8	0.8
Networking equipment	0.9	1.0	0.9	0.9	0.9	0.9
Hardware total	1.2	1.1	1.1	1.1	1.1	1.2
Packaged software total	0.4	0.4	0.4	0.4	0.4	0.4
Services total	0.5	0.5	0.6	0.6	0.6	0.6
Total IT	0.8	0.7	0.8	0.8	0.8	0.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 380

IT SPENDING IN THE REST OF LATIN AMERICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	57.2	55.6	56.6	61.0	67.6	71.2
Implementation	204.8	213.5	216.1	231.5	256.2	268.8
Maintenance and support	138.4	144.2	143.5	153.1	169.3	177.4
Operations	84.4	83.6	87.6	97.7	112.3	121.3
IT training and education	19.3	21.2	22.7	24.0	26.3	27.3
Services total	504.2	518.1	526.4	567.2	631.7	666.0
Packaged software						
System infrastructure software	63.8	66.8	72.2	79.9	88.4	96.4
Appl. development and deployment	123.3	127.9	140.7	156.0	173.4	181.5
Applications	42.5	44.6	48.3	53.3	58.3	64.4
Packaged software total	229.5	239.4	261.2	289.1	320.2	342.3
Hardware						
Systems						
High-end enterprise servers	29.8	27.6	28.9	29.4	29.5	30.0
Midrange enterprise servers	52.4	48.7	50.9	53.3	56.4	59.3
Volume servers	100.1	107.2	111.0	115.7	121.2	127.5
Servers total	182.3	183.4	190.8	198.4	207.1	216.8
Personal computers	1,137.6	1,070.8	1,084.4	1,115.8	1,142.4	1,161.5
Traditional workstations	24.9	21.6	20.4	19.1	17.2	12.8
Clients total	1,162.5	1,092.4	1,104.7	1,134.9	1,159.6	1,174.2
Systems total	1,344.8	1,275.8	1,295.6	1,333.3	1,366.8	1,391.1
Storage						
Disk systems	73.6	84.6	96.0	108.3	121.0	134.4
Tape automation	18.4	19.8	21.8	23.8	25.7	27.5
Storage total	91.9	104.4	117.8	132.0	146.7	161.9
Peripherals						
Printers and MFPs	217.9	258.7	275.4	303.2	317.6	346.2
Smart handheld devices	19.8	21.0	23.1	24.8	27.3	29.7
Other add-ons	23.0	24.2	28.1	32.0	36.1	40.0
Peripherals total	260.7	303.9	326.5	360.0	381.0	415.9
Networking equipment	187.6	195.3	201.3	210.5	222.2	243.3
Hardware total	1,885.1	1,879.4	1,941.2	2,035.7	2,116.6	2,212.2
Packaged software total	229.5	239.4	261.2	289.1	320.2	342.3
Services total	504.2	518.1	526.4	567.2	631.7	666.0
Total IT	2,618.8	2,636.9	2,728.8	2,892.1	3,068.5	3,220.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 381

GROWTH IN IT SPENDING IN THE REST OF LATIN AMERICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-2.9	1.8	7.8	10.9	5.3	6.4
Implementation	4.2	1.2	7.1	10.7	4.9	5.9
Maintenance and support	4.2	-0.5	6.7	10.6	4.8	5.3
Operations	-1.0	4.8	11.5	15.0	8.0	9.8
IT training and education	9.6	7.1	5.8	9.3	4.0	6.5
Services total	2.7	1.6	7.7	11.4	5.4	6.5
Packaged software						
System infrastructure software	4.8	8.0	10.6	10.7	9.0	9.6
Appl. development and deployment	3.7	10.0	10.8	11.2	4.6	9.1
Applications	5.1	8.1	10.4	9.5	10.4	9.6
Packaged software total	4.3	9.1	10.7	10.7	6.9	9.4
Hardware						
Systems						
High-end enterprise servers	-7.4	4.6	1.7	0.4	1.7	2.1
Midrange enterprise servers	-7.0	4.6	4.6	5.9	5.2	5.1
Volume servers	7.0	3.6	4.3	4.8	5.2	4.4
Servers total	0.6	4.0	4.0	4.4	4.7	4.3
Personal computers	-5.9	1.3	2.9	2.4	1.7	2.1
Traditional workstations	-13.0	-5.9	-6.0	-10.1	-25.8	-12.3
Clients total	-5.9	1.3	2.9	2.4	1.7	2.1
Systems total	-5.1	1.5	2.9	2.5	1.8	2.2
Storage						
Disk systems	15.0	13.5	12.8	11.8	11.1	12.3
Tape automation	7.9	9.8	9.1	8.0	7.2	8.5
Storage total	13.6	12.8	12.1	11.1	10.4	11.6
Peripherals						
Printers and MFPs	18.7	6.4	10.1	4.8	9.0	7.6
Smart handheld devices	6.0	10.3	7.3	9.9	9.0	9.1
Other add-ons	5.1	15.9	13.9	12.9	10.8	13.4
Peripherals total	16.5	7.5	10.2	5.8	9.2	8.2
Networking equipment	4.1	3.1	4.5	5.6	9.5	5.7
Hardware total	-0.3	3.3	4.9	4.0	4.5	4.2
Packaged software total	4.3	9.1	10.7	10.7	6.9	9.4
Services total	2.7	1.6	7.7	11.4	5.4	6.5
Total IT	0.7	3.5	6.0	6.1	5.0	5.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 382

PROPORTIONS OF IT SPENDING CATEGORIES IN THE REST OF LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.1	2.1	2.1	2.2	2.2
Implementation	7.8	8.1	7.9	8.0	8.3	8.3
Maintenance and support	5.3	5.5	5.3	5.3	5.5	5.5
Operations	3.2	3.2	3.2	3.4	3.7	3.8
IT training and education	0.7	0.8	0.8	0.8	0.9	0.8
Services total	19.3	19.6	19.3	19.6	20.6	20.7
Packaged software						
System infrastructure software	2.4	2.5	2.6	2.8	2.9	3.0
Appl. development and deployment	4.7	4.9	5.2	5.4	5.7	5.6
Applications	1.6	1.7	1.8	1.8	1.9	2.0
Packaged software total	8.8	9.1	9.6	10.0	10.4	10.6
Hardware						
Systems						
High-end enterprise servers	1.1	1.0	1.1	1.0	1.0	0.9
Midrange enterprise servers	2.0	1.8	1.9	1.8	1.8	1.8
Volume servers	3.8	4.1	4.1	4.0	4.0	4.0
Servers total	7.0	7.0	7.0	6.9	6.7	6.7
Personal computers	43.4	40.6	39.7	38.6	37.2	36.1
Traditional workstations	0.9	0.8	0.7	0.7	0.6	0.4
Clients total	43.4	40.6	39.7	38.6	37.2	36.1
Systems total	51.4	48.4	47.5	46.1	44.5	43.2
Storage						
Disk systems	2.8	3.2	3.5	3.7	3.9	4.2
Tape automation	0.7	0.8	0.8	0.8	0.8	0.9
Storage total	3.5	4.0	4.3	4.6	4.8	5.0
Peripherals						
Printers and MFPs	8.3	9.8	10.1	10.5	10.4	10.7
Smart handheld devices	0.8	0.8	0.8	0.9	0.9	0.9
Other add-ons	0.9	0.9	1.0	1.1	1.2	1.2
Peripherals total	10.0	11.5	12.0	12.4	12.4	12.9
Networking equipment	7.2	7.4	7.4	7.3	7.2	7.6
Hardware total	72.0	71.3	71.1	70.4	69.0	68.7
Packaged software total	8.8	9.1	9.6	10.0	10.4	10.6
Services total	19.3	19.6	19.3	19.6	20.6	20.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 383

REST OF LATIN AMERICA PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	7.3	7.3	6.7	6.5	6.5	6.2
Implementation	6.8	7.3	6.7	6.5	6.5	6.2
Maintenance and support	6.9	7.4	6.7	6.5	6.5	6.2
Operations	7.3	7.3	6.7	6.5	6.5	6.2
IT training and education	6.0	6.8	6.7	6.5	6.5	6.2
Services total	6.9	7.3	6.7	6.5	6.5	6.2
Packaged software						
System infrastructure software	5.7	5.7	5.6	5.8	5.9	6.1
Appl. development and deployment	11.5	11.3	11.4	11.5	11.8	11.5
Applications	3.9	3.9	3.8	3.8	3.9	4.0
Packaged software total	7.0	6.9	6.9	7.0	7.1	7.2
Hardware						
Systems						
High-end enterprise servers	6.8	7.8	7.9	7.8	7.6	7.5
Midrange enterprise servers	14.3	15.0	14.7	14.6	14.7	15.0
Volume servers	20.0	20.8	20.1	20.2	20.6	21.0
Servers total	13.9	15.3	15.1	15.1	15.2	15.5
Personal computers	15.5	15.1	14.5	14.2	14.0	13.8
Traditional workstations	19.9	20.4	21.1	20.7	22.3	14.4
Clients total	15.6	15.2	14.6	14.3	14.1	13.8
Systems total	15.3	15.2	14.7	14.4	14.2	14.0
Storage						
Disk systems	12.1	12.9	13.0	13.1	13.2	13.3
Tape automation	10.1	10.7	10.9	11.0	11.2	11.3
Storage total	11.6	12.4	12.5	12.7	12.8	12.9
Peripherals						
Printers and MFPs	18.6	21.4	20.8	20.9	20.4	20.5
Smart handheld devices	6.9	8.4	8.0	8.0	7.8	7.7
Other add-ons	15.7	15.9	15.3	15.1	14.8	14.6
Peripherals total	16.2	18.9	18.2	18.2	17.7	17.7
Networking equipment	11.1	11.3	11.0	10.9	10.8	10.8
Hardware total	14.7	15.0	14.5	14.3	14.2	14.0
Packaged software total	7.0	6.9	6.9	7.0	7.1	7.2
Services total	6.9	7.3	6.7	6.5	6.5	6.2
Total IT	11.2	11.4	10.9	10.7	10.5	10.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 384

REST OF LATIN AMERICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.1	0.2	0.2	0.2
Implementation	0.2	0.2	0.2	0.2	0.2	0.2
Maintenance and support	0.1	0.2	0.1	0.1	0.1	0.1
Operations	0.1	0.1	0.1	0.1	0.1	0.1
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.2
Appl. development and deployment	0.3	0.3	0.3	0.3	0.4	0.3
Applications	0.0	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.2	0.2	0.3	0.3	0.3	0.3
Midrange enterprise servers	0.4	0.4	0.4	0.4	0.4	0.4
Volume servers	0.5	0.5	0.5	0.4	0.4	0.4
Servers total	0.4	0.4	0.4	0.4	0.4	0.4
Personal computers	0.7	0.7	0.7	0.7	0.7	0.7
Traditional workstations	1.1	1.3	1.6	1.8	2.0	1.6
Clients total	0.7	0.7	0.7	0.7	0.7	0.7
Systems total	0.7	0.7	0.6	0.6	0.6	0.6
Storage						
Disk systems	0.3	0.4	0.4	0.5	0.5	0.6
Tape automation	0.6	0.7	0.7	0.7	0.8	0.8
Storage total	0.4	0.4	0.5	0.5	0.6	0.6
Peripherals						
Printers and MFPs	0.5	0.6	0.6	0.6	0.7	0.7
Smart handheld devices	0.3	0.2	0.1	0.1	0.1	0.1
Other add-ons	0.2	0.2	0.2	0.3	0.3	0.3
Peripherals total	0.4	0.5	0.4	0.4	0.4	0.4
Networking equipment	0.4	0.4	0.4	0.4	0.4	0.4
Hardware total	0.6	0.6	0.6	0.5	0.5	0.5
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.3	0.3	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 385

IT SPENDING IN VENEZUELA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	36.9	23.0	25.6	29.6	33.7	38.5
Implementation	123.7	78.5	87.9	101.3	115.1	130.4
Maintenance and support	119.5	79.0	89.7	103.4	117.3	132.5
Operations	141.0	92.6	105.8	121.6	137.5	156.0
IT training and education	16.3	10.7	11.5	13.1	14.7	16.4
Services total	437.4	283.9	320.5	369.0	418.3	473.8
Packaged software						
System infrastructure software	30.7	22.0	26.8	35.5	44.2	49.3
Appl. development and deployment	57.7	42.1	50.0	65.0	79.7	89.4
Applications	63.2	42.7	53.7	76.6	91.5	99.7
Packaged software total	151.5	106.8	130.5	177.1	215.5	238.4
Hardware						
Systems						
High-end enterprise servers	23.3	10.7	10.9	14.8	15.9	17.3
Midrange enterprise servers	20.7	11.9	13.8	19.3	21.0	22.0
Volume servers	15.0	11.2	11.7	17.6	18.6	19.4
Servers total	59.0	33.7	36.4	51.7	55.5	58.7
Personal computers	210.3	90.3	100.2	119.4	138.9	143.2
Traditional workstations	7.0	2.3	2.0	1.9	1.1	0.1
Clients total	217.3	92.5	102.2	121.3	139.9	143.3
Systems total	276.3	126.2	138.7	172.9	195.4	202.0
Storage						
Disk systems	59.0	38.6	44.2	51.0	60.2	72.9
Tape automation	14.8	9.1	10.0	11.2	12.8	14.9
Storage total	73.8	47.7	54.3	62.2	72.9	87.9
Peripherals						
Printers and MFPs	31.8	33.1	34.1	34.7	36.9	39.1
Smart handheld devices	4.2	2.8	2.7	3.6	4.0	4.3
Other add-ons	4.2	2.3	2.8	3.5	4.3	4.8
Peripherals total	40.1	38.2	39.6	41.8	45.3	48.2
Networking equipment	72.2	51.9	63.0	74.6	83.0	97.0
Hardware total	462.3	264.0	295.6	351.5	396.6	435.1
Packaged software total	151.5	106.8	130.5	177.1	215.5	238.4
Services total	437.4	283.9	320.5	369.0	418.3	473.8
Total IT	1,051.3	654.6	746.6	897.6	1,030.4	1,147.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 386

GROWTH IN IT SPENDING IN VENEZUELA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-37.8	11.4	15.7	14.1	14.1	13.8
Implementation	-36.5	12.0	15.3	13.5	13.3	13.5
Maintenance and support	-33.9	13.5	15.3	13.4	12.9	13.8
Operations	-34.3	14.2	14.9	13.1	13.5	13.9
IT training and education	-34.2	7.0	13.7	12.7	11.2	11.1
Services total	-35.1	12.9	15.1	13.4	13.3	13.7
Packaged software						
System infrastructure software	-28.3	22.2	32.1	24.7	11.5	22.4
Appl. development and deployment	-27.0	18.7	30.1	22.7	12.1	20.7
Applications	-32.5	25.7	42.7	19.5	8.9	23.6
Packaged software total	-29.6	22.2	35.7	21.7	10.6	22.2
Hardware						
Systems						
High-end enterprise servers	-54.2	1.7	36.1	7.0	9.0	12.7
Midrange enterprise servers	-42.6	16.3	39.7	9.2	4.6	16.7
Volume servers	-25.8	5.2	49.8	5.6	4.6	14.9
Servers total	-42.9	8.0	41.9	7.4	5.9	14.9
Personal computers	-57.1	11.0	19.1	16.3	3.1	12.2
Traditional workstations	-67.7	-9.6	-8.5	-43.5	-86.4	-49.8
Clients total	-57.1	11.0	19.1	16.3	3.1	12.2
Systems total	-54.3	9.8	24.7	13.0	3.4	12.5
Storage						
Disk systems	-34.5	14.6	15.2	18.1	21.2	17.2
Tape automation	-38.6	10.9	11.4	14.1	17.0	13.3
Storage total	-35.3	13.9	14.5	17.3	20.5	16.5
Peripherals						
Printers and MFPs	4.4	3.0	1.7	6.3	5.8	4.2
Smart handheld devices	-33.8	-1.4	33.6	9.9	6.8	11.5
Other add-ons	-45.6	22.8	25.4	24.4	11.0	20.7
Peripherals total	-4.8	3.8	5.5	8.2	6.4	6.0
Networking equipment	-28.1	21.3	18.5	11.2	16.9	16.9
Hardware total	-42.9	12.0	18.9	12.8	9.7	13.3
Packaged software total	-29.6	22.2	35.7	21.7	10.6	22.2
Services total	-35.1	12.9	15.1	13.4	13.3	13.7
Total IT	-37.7	14.0	20.2	14.8	11.3	15.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 387

PROPORTIONS OF IT SPENDING CATEGORIES IN VENEZUELA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.5	3.5	3.4	3.3	3.3	3.4
Implementation	11.8	12.0	11.8	11.3	11.2	11.4
Maintenance and support	11.4	12.1	12.0	11.5	11.4	11.5
Operations	13.4	14.1	14.2	13.5	13.3	13.6
IT training and education	1.6	1.6	1.5	1.5	1.4	1.4
Services total	41.6	43.4	42.9	41.1	40.6	41.3
Packaged software						
System infrastructure software	2.9	3.4	3.6	4.0	4.3	4.3
Appl. development and deployment	5.5	6.4	6.7	7.2	7.7	7.8
Applications	6.0	6.5	7.2	8.5	8.9	8.7
Packaged software total	14.4	16.3	17.5	19.7	20.9	20.8
Hardware						
Systems						
High-end enterprise servers	2.2	1.6	1.5	1.6	1.5	1.5
Midrange enterprise servers	2.0	1.8	1.8	2.1	2.0	1.9
Volume servers	1.4	1.7	1.6	2.0	1.8	1.7
Servers total	5.6	5.2	4.9	5.8	5.4	5.1
Personal computers	20.0	13.8	13.4	13.3	13.5	12.5
Traditional workstations	0.7	0.3	0.3	0.2	0.1	0.0
Clients total	20.0	13.8	13.4	13.3	13.5	12.5
Systems total	26.3	19.3	18.6	19.3	19.0	17.6
Storage						
Disk systems	5.6	5.9	5.9	5.7	5.8	6.4
Tape automation	1.4	1.4	1.3	1.2	1.2	1.3
Storage total	7.0	7.3	7.3	6.9	7.1	7.7
Peripherals						
Printers and MFPs	3.0	5.1	4.6	3.9	3.6	3.4
Smart handheld devices	0.4	0.4	0.4	0.4	0.4	0.4
Other add-ons	0.4	0.3	0.4	0.4	0.4	0.4
Peripherals total	3.8	5.8	5.3	4.7	4.4	4.2
Networking equipment	6.9	7.9	8.4	8.3	8.1	8.5
Hardware total	44.0	40.3	39.6	39.2	38.5	37.9
Packaged software total	14.4	16.3	17.5	19.7	20.9	20.8
Services total	41.6	43.4	42.9	41.1	40.6	41.3
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 388

VENEZUELA PROPORTIONS OF THE IT SPENDING IN LATIN AMERICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.7	3.0	3.0	3.2	3.3	3.4
Implementation	4.1	2.7	2.7	2.9	2.9	3.0
Maintenance and support	6.0	4.0	4.2	4.4	4.5	4.7
Operations	12.3	8.1	8.1	8.1	8.0	8.0
IT training and education	5.0	3.5	3.4	3.5	3.7	3.7
Services total	6.0	4.0	4.1	4.2	4.3	4.4
Packaged software						
System infrastructure software	2.8	1.9	2.1	2.6	3.0	3.1
Appl. development and deployment	5.4	3.7	4.0	4.8	5.4	5.7
Applications	5.8	3.7	4.3	5.5	6.0	6.2
Packaged software total	4.6	3.1	3.5	4.3	4.8	5.0
Hardware						
Systems						
High-end enterprise servers	5.3	3.0	3.0	3.9	4.1	4.3
Midrange enterprise servers	5.6	3.6	4.0	5.3	5.5	5.6
Volume servers	3.0	2.2	2.1	3.1	3.2	3.2
Servers total	4.5	2.8	2.9	3.9	4.1	4.2
Personal computers	2.9	1.3	1.3	1.5	1.7	1.7
Traditional workstations	5.6	2.1	2.1	2.0	1.4	0.2
Clients total	2.9	1.3	1.3	1.5	1.7	1.7
Systems total	3.1	1.5	1.6	1.9	2.0	2.0
Storage						
Disk systems	9.7	5.9	6.0	6.2	6.6	7.2
Tape automation	8.1	4.9	5.0	5.2	5.6	6.1
Storage total	9.3	5.7	5.8	6.0	6.4	7.0
Peripherals						
Printers and MFPs	2.7	2.7	2.6	2.4	2.4	2.3
Smart handheld devices	1.4	1.1	0.9	1.2	1.1	1.1
Other add-ons	2.8	1.5	1.5	1.6	1.8	1.8
Peripherals total	2.5	2.4	2.2	2.1	2.1	2.1
Networking equipment	4.3	3.0	3.4	3.9	4.0	4.3
Hardware total	3.6	2.1	2.2	2.5	2.7	2.8
Packaged software total	4.6	3.1	3.5	4.3	4.8	5.0
Services total	6.0	4.0	4.1	4.2	4.3	4.4
Total IT	4.5	2.8	3.0	3.3	3.5	3.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 389

VENEZUELA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.2	0.1	0.1	0.2	0.2	0.2
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.0	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.2	0.2
Applications	0.1	0.0	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.2	0.1	0.1	0.1	0.1	0.2
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.1	0.1	0.0	0.1	0.1	0.1
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.1
Traditional workstations	0.3	0.1	0.2	0.2	0.1	0.0
Clients total	0.1	0.1	0.1	0.1	0.1	0.1
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.3	0.2	0.2	0.2	0.3	0.3
Tape automation	0.5	0.3	0.3	0.4	0.4	0.4
Storage total	0.3	0.2	0.2	0.2	0.3	0.3
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.1	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.0	0.0	0.0	0.0	0.0	0.0
Peripherals total	0.1	0.1	0.1	0.1	0.1	0.0
Networking equipment	0.1	0.1	0.1	0.1	0.1	0.1
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

MIDDLE EAST AND AFRICA

Current forecasts indicate that IT spending in the Middle East/Africa (MEA) will accelerate over the next two years after a steady performance in 2002. The impact of the war in Iraq on IT investment in MEA was ultimately slight and short lived. In Dubai, plans have recently been unveiled for several ambitious new leisure projects. These are indicative of the feeling that tourism and travel will continue to recover. Moreover, major rebuilding projects in Iraq should drive demand for IT in this new market. Generally, IDC's local hardware and software research suggests that the small and medium-sized business segment has emerged as a major driver of IT spending in the Gulf. Higher demand in this market will offset any potential slowdown in spending among large accounts.

Current forecasts indicate that IT spending in the Middle East/Africa will accelerate over the next two years after a steady performance in 2002.

For Israel, the impact of the country's economic and security problems will be seen in negative IT market growth of 2.0% in 2003. However, all other countries are expected to record positive growth rates, ranging from 8.3% in Saudi Arabia (where high energy prices are giving the economy a boost) to 16.1% in Turkey (as the country continues to recover from its 2001 financial crisis). In Egypt, IT spending will increase more than 12% this year, helped by a major PC investment project in the country's education sector and an influx of support from international financial institutions. In South Africa, IT demand has been bolstered by solid economic growth.

Although some country markets already display an advanced model of technology spending, with a high proportion of investment composed of complex solutions, the regional IT market in MEA is in transition. Hardware will account for approximately 50% of total IT expenditure for the foreseeable future, despite ongoing price declines in this technology space. This is welcome news for hardware vendors encountering saturation in more developed markets. Nevertheless, IDC's research indicates that the MEA market is slowly moving from hardware acquisition toward greater investment in packaged software applications and IT services.

Hardware will account for approximately 50% of total IT expenditure for the foreseeable future, despite ongoing price declines in this technology space.

Tables 390–428 illustrate IT spending forecasts for the Middle East and Africa, with country-level detail for Egypt, Israel, Saudi Arabia, South Africa, Turkey, and the United Arab Emirates.

TABLE 390

IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	558.2	604.0	688.7	785.7	875.2	971.4
Implementation	2,276.5	2,487.7	2,827.8	3,248.2	3,647.9	4,092.4
Maintenance and support	1,292.2	1,404.3	1,565.3	1,751.7	1,920.4	2,129.2
Operations	605.9	680.9	775.7	879.7	980.3	1,075.7
IT training and education	237.6	262.9	306.4	357.3	408.2	457.8
Services total	4,970.3	5,439.8	6,164.0	7,022.6	7,831.9	8,726.4
Packaged software						
System infrastructure software	682.3	758.4	879.0	1,011.4	1,139.2	1,265.8
Appl. development and deployment	549.0	604.6	692.1	797.4	907.2	1,016.6
Applications	1,434.1	1,558.4	1,730.5	1,931.6	2,117.7	2,400.4
Packaged software total	2,665.4	2,921.4	3,301.6	3,740.4	4,164.0	4,682.8
Hardware						
Systems						
High-end enterprise servers	125.2	99.3	103.0	105.7	107.1	117.1
Midrange enterprise servers	267.2	263.2	299.3	324.4	340.7	367.3
Volume servers	657.5	713.6	837.5	928.4	1,035.3	1,134.3
Servers total	1,049.9	1,076.1	1,239.8	1,358.5	1,483.1	1,618.7
Personal computers	3,785.9	4,096.1	4,583.5	5,111.7	5,673.2	6,258.4
Traditional workstations	61.2	56.4	54.1	51.8	48.8	43.8
Clients total	3,847.1	4,152.5	4,637.6	5,163.5	5,722.0	6,302.3
Systems total	4,896.9	5,228.6	5,877.5	6,522.0	7,205.1	7,921.0
Storage						
Disk systems	275.4	306.9	343.8	391.1	455.7	516.8
Tape automation	89.2	97.8	99.8	109.6	116.2	129.8
Storage total	364.6	404.7	443.6	500.6	571.9	646.6
Peripherals						
Printers and MFPs	918.0	985.5	1,056.7	1,140.4	1,217.8	1,286.7
Smart handheld devices	46.8	61.0	76.0	87.7	100.9	111.2
Other add-ons	598.1	650.5	764.4	881.1	991.3	1,112.0
Peripherals total	1,562.9	1,697.1	1,897.1	2,109.2	2,310.0	2,509.9
Networking equipment	1,188.7	1,329.3	1,598.2	1,819.5	2,062.3	2,279.1
Hardware total	8,013.2	8,659.7	9,816.4	10,951.3	12,149.2	13,356.6
Packaged software total	2,665.4	2,921.4	3,301.6	3,740.4	4,164.0	4,682.8
Services total	4,970.3	5,439.8	6,164.0	7,022.6	7,831.9	8,726.4
Total IT	15,648.9	17,020.8	19,282.0	21,714.4	24,145.2	26,765.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 391

GROWTH IN IT SPENDING IN MIDDLE EAST/AFRICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	8.2	14.0	14.1	11.4	11.0	12.6
Implementation	9.3	13.7	14.9	12.3	12.2	13.3
Maintenance and support	8.7	11.5	11.9	9.6	10.9	11.0
Operations	12.4	13.9	13.4	11.4	9.7	12.1
IT training and education	10.6	16.6	16.6	14.2	12.2	14.9
Services total	9.4	13.3	13.9	11.5	11.4	12.5
Packaged software						
System infrastructure software	11.1	15.9	15.1	12.6	11.1	13.7
Appl. development and deployment	10.1	14.5	15.2	13.8	12.1	13.9
Applications	8.7	11.0	11.6	9.6	13.4	11.4
Packaged software total	9.6	13.0	13.3	11.3	12.5	12.5
Hardware						
Systems						
High-end enterprise servers	-20.7	3.7	2.6	1.3	9.4	4.2
Midrange enterprise servers	-1.5	13.7	8.4	5.0	7.8	8.7
Volume servers	8.5	17.4	10.9	11.5	9.6	12.3
Servers total	2.5	15.2	9.6	9.2	9.1	10.7
Personal computers	8.2	11.9	11.5	11.0	10.3	11.2
Traditional workstations	-7.8	-4.0	-4.4	-5.7	-10.2	-6.1
Clients total	8.2	11.9	11.5	11.0	10.3	11.2
Systems total	6.8	12.4	11.0	10.5	9.9	10.9
Storage						
Disk systems	11.4	12.0	13.8	16.5	13.4	13.9
Tape automation	9.6	2.1	9.7	6.0	11.7	7.3
Storage total	11.0	9.6	12.9	14.2	13.1	12.4
Peripherals						
Printers and MFPs	7.4	7.2	7.9	6.8	5.7	6.9
Smart handheld devices	30.5	24.5	15.5	15.0	10.2	16.2
Other add-ons	8.8	17.5	15.3	12.5	12.2	14.3
Peripherals total	8.6	11.8	11.2	9.5	8.7	10.3
Networking equipment	11.8	20.2	13.8	13.3	10.5	14.4
Hardware total	8.1	13.4	11.6	10.9	9.9	11.4
Packaged software total	9.6	13.0	13.3	11.3	12.5	12.5
Services total	9.4	13.3	13.9	11.5	11.4	12.5
Total IT	8.8	13.3	12.6	11.2	10.9	12.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 392

PROPORTIONS OF IT SPENDING CATEGORIES IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	3.6	3.5	3.6	3.6	3.6	3.6
Implementation	14.5	14.6	14.7	15.0	15.1	15.3
Maintenance and support	8.3	8.3	8.1	8.1	8.0	8.0
Operations	3.9	4.0	4.0	4.1	4.1	4.0
IT training and education	1.5	1.5	1.6	1.6	1.7	1.7
Services total	31.8	32.0	32.0	32.3	32.4	32.6
Packaged software						
System infrastructure software	4.4	4.5	4.6	4.7	4.7	4.7
Appl. development and deployment	3.5	3.6	3.6	3.7	3.8	3.8
Applications	9.2	9.2	9.0	8.9	8.8	9.0
Packaged software total	17.0	17.2	17.1	17.2	17.2	17.5
Hardware						
Systems						
High-end enterprise servers	0.8	0.6	0.5	0.5	0.4	0.4
Midrange enterprise servers	1.7	1.5	1.6	1.5	1.4	1.4
Volume servers	4.2	4.2	4.3	4.3	4.3	4.2
Servers total	6.7	6.3	6.4	6.3	6.1	6.0
Personal computers	24.2	24.1	23.8	23.5	23.5	23.4
Traditional workstations	0.4	0.3	0.3	0.2	0.2	0.2
Clients total	24.2	24.1	23.8	23.5	23.5	23.4
Systems total	31.3	30.7	30.5	30.0	29.8	29.6
Storage						
Disk systems	1.8	1.8	1.8	1.8	1.9	1.9
Tape automation	0.6	0.6	0.5	0.5	0.5	0.5
Storage total	2.3	2.4	2.3	2.3	2.4	2.4
Peripherals						
Printers and MFPs	5.9	5.8	5.5	5.3	5.0	4.8
Smart handheld devices	0.3	0.4	0.4	0.4	0.4	0.4
Other add-ons	3.8	3.8	4.0	4.1	4.1	4.2
Peripherals total	10.0	10.0	9.8	9.7	9.6	9.4
Networking equipment	7.6	7.8	8.3	8.4	8.5	8.5
Hardware total	51.2	50.9	50.9	50.4	50.3	49.9
Packaged software total	17.0	17.2	17.1	17.2	17.2	17.5
Services total	31.8	32.0	32.0	32.3	32.4	32.6
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 393

MIDDLE EAST/AFRICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	1.5	1.6	1.8	2.0	2.0	2.1
Implementation	1.7	1.9	2.0	2.2	2.3	2.4
Maintenance and support	1.4	1.5	1.6	1.6	1.7	1.7
Operations	0.9	1.0	1.0	1.1	1.1	1.2
IT training and education	1.1	1.2	1.4	1.6	1.7	1.8
Services total	1.4	1.5	1.7	1.8	1.8	1.9
Packaged software						
System infrastructure software	1.5	1.6	1.7	1.9	1.9	2.0
Appl. development and deployment	1.4	1.5	1.6	1.8	1.8	1.9
Applications	1.7	1.8	1.9	1.9	2.0	2.1
Packaged software total	1.6	1.7	1.8	1.9	1.9	2.0
Hardware						
Systems						
High-end enterprise servers	0.9	0.8	0.9	0.9	1.0	1.1
Midrange enterprise servers	1.8	2.0	2.1	2.2	2.3	2.3
Volume servers	3.1	3.2	3.5	3.6	3.7	3.9
Servers total	2.1	2.3	2.5	2.6	2.7	2.9
Personal computers	2.5	2.8	3.0	3.3	3.5	3.8
Traditional workstations	2.6	3.4	4.2	4.9	5.6	5.6
Clients total	2.5	2.8	3.1	3.3	3.5	3.8
Systems total	2.4	2.7	2.9	3.1	3.3	3.6
Storage						
Disk systems	1.3	1.5	1.6	1.8	2.0	2.2
Tape automation	3.0	3.3	3.3	3.4	3.5	3.7
Storage total	1.5	1.7	1.8	2.0	2.2	2.4
Peripherals						
Printers and MFPs	2.2	2.3	2.4	2.4	2.5	2.6
Smart handheld devices	0.6	0.6	0.5	0.4	0.3	0.3
Other add-ons	4.7	5.6	6.5	7.3	7.8	8.5
Peripherals total	2.6	2.6	2.6	2.6	2.6	2.6
Networking equipment	2.4	2.7	3.1	3.2	3.3	3.4
Hardware total	2.3	2.6	2.8	2.9	3.1	3.2
Packaged software total	1.6	1.7	1.8	1.9	1.9	2.0
Services total	1.4	1.5	1.7	1.8	1.8	1.9
Total IT	1.8	2.0	2.1	2.2	2.3	2.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 394

IT SPENDING IN EGYPT, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	12.4	13.4	16.7	19.0	22.2	24.8
Implementation	68.8	73.7	88.6	106.3	122.3	139.3
Maintenance and support	38.4	40.5	43.2	48.7	54.0	59.5
Operations	2.1	2.5	3.9	4.7	5.4	6.4
IT training and education	3.5	3.6	4.9	6.3	9.2	11.9
Services total	125.2	133.6	157.3	185.1	213.0	242.0
Packaged software						
System infrastructure software	20.1	21.2	23.7	26.1	34.3	37.3
Appl. development and deployment	18.3	18.2	20.1	22.9	26.8	30.1
Applications	58.8	62.7	71.4	82.6	94.4	108.2
Packaged software total	97.2	102.0	115.2	131.6	155.5	175.7
Hardware						
Systems						
High-end enterprise servers	1.6	3.1	4.3	2.7	1.8	3.5
Midrange enterprise servers	9.0	8.8	9.9	11.0	10.7	11.1
Volume servers	20.2	18.7	24.1	26.1	27.7	29.3
Servers total	30.8	30.6	38.3	39.8	40.3	43.8
Personal computers	141.2	185.8	199.1	211.0	232.3	254.3
Traditional workstations	3.6	4.2	3.8	3.3	3.5	3.1
Clients total	144.8	190.0	202.9	214.3	235.8	257.4
Systems total	175.6	220.7	241.3	254.1	276.0	301.2
Storage						
Disk systems	6.2	7.3	9.4	11.5	12.3	12.6
Tape automation	2.9	3.3	3.7	4.0	4.0	4.5
Storage total	9.1	10.6	13.2	15.5	16.4	17.0
Peripherals						
Printers and MFPs	61.3	64.1	64.9	67.3	67.9	71.9
Smart handheld devices	3.6	4.3	5.2	5.9	6.2	6.8
Other add-ons	27.4	30.6	36.9	38.6	39.9	44.6
Peripherals total	92.3	99.0	107.0	111.8	114.1	123.3
Networking equipment	65.6	68.2	74.3	87.9	96.5	102.4
Hardware total	342.6	398.5	435.8	469.3	502.9	543.9
Packaged software total	97.2	102.0	115.2	131.6	155.5	175.7
Services total	125.2	133.6	157.3	185.1	213.0	242.0
Total IT	565.0	634.2	708.3	785.9	871.4	961.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 395

GROWTH IN IT SPENDING IN EGYPT, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	7.8	24.9	14.1	16.6	11.9	16.8
Implementation	7.1	20.2	20.0	15.1	13.9	17.3
Maintenance and support	5.5	6.7	12.8	10.8	10.2	10.1
Operations	15.2	59.2	18.8	15.0	19.9	27.1
IT training and education	3.7	35.3	28.4	44.9	29.7	34.4
Services total	6.7	17.7	17.6	15.1	13.6	16.0
Packaged software						
System infrastructure software	5.3	12.1	10.2	31.2	8.7	15.2
Appl. development and deployment	-0.8	10.6	13.6	17.2	12.6	13.4
Applications	6.6	13.9	15.7	14.3	14.7	14.6
Packaged software total	4.9	12.9	14.2	18.2	13.0	14.5
Hardware						
Systems						
High-end enterprise servers	89.0	38.9	-37.7	-32.2	89.1	2.6
Midrange enterprise servers	-2.3	12.5	11.0	-2.6	3.1	5.8
Volume servers	-7.2	28.8	8.4	6.2	5.6	11.8
Servers total	-0.6	25.1	3.8	1.2	8.7	9.3
Personal computers	31.6	7.2	5.9	10.1	9.5	8.2
Traditional workstations	16.7	-9.8	-13.5	6.1	-10.3	-7.2
Clients total	31.6	7.2	5.9	10.1	9.5	8.2
Systems total	25.7	9.3	5.3	8.6	9.1	8.1
Storage						
Disk systems	19.2	28.5	22.0	7.2	1.9	14.4
Tape automation	11.9	14.1	7.9	0.2	10.6	8.1
Storage total	16.8	24.0	18.0	5.4	4.1	12.5
Peripherals						
Printers and MFPs	4.6	1.4	3.6	0.9	5.8	2.9
Smart handheld devices	21.3	20.1	13.1	6.1	9.5	12.1
Other add-ons	11.6	20.5	4.7	3.4	11.6	9.9
Peripherals total	7.3	8.1	4.4	2.1	8.1	5.6
Networking equipment	3.9	8.9	18.3	9.7	6.2	10.7
Hardware total	16.3	9.4	7.7	7.2	8.2	8.1
Packaged software total	4.9	12.9	14.2	18.2	13.0	14.5
Services total	6.7	17.7	17.6	15.1	13.6	16.0
Total IT	12.2	11.7	11.0	10.9	10.4	11.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 396

PROPORTIONS OF IT SPENDING CATEGORIES IN EGYPT, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.1	2.4	2.4	2.5	2.6
Implementation	12.2	11.6	12.5	13.5	14.0	14.5
Maintenance and support	6.8	6.4	6.1	6.2	6.2	6.2
Operations	0.4	0.4	0.6	0.6	0.6	0.7
IT training and education	0.6	0.6	0.7	0.8	1.1	1.2
Services total	22.2	21.1	22.2	23.5	24.4	25.2
Packaged software						
System infrastructure software	3.6	3.3	3.4	3.3	3.9	3.9
Appl. development and deployment	3.2	2.9	2.8	2.9	3.1	3.1
Applications	10.4	9.9	10.1	10.5	10.8	11.3
Packaged software total	17.2	16.1	16.3	16.7	17.8	18.3
Hardware						
Systems						
High-end enterprise servers	0.3	0.5	0.6	0.3	0.2	0.4
Midrange enterprise servers	1.6	1.4	1.4	1.4	1.2	1.2
Volume servers	3.6	2.9	3.4	3.3	3.2	3.0
Servers total	5.5	4.8	5.4	5.1	4.6	4.6
Personal computers	25.0	29.3	28.1	26.8	26.7	26.4
Traditional workstations	0.6	0.7	0.5	0.4	0.4	0.3
Clients total	25.0	29.3	28.1	26.8	26.7	26.4
Systems total	31.1	34.8	34.1	32.3	31.7	31.3
Storage						
Disk systems	1.1	1.2	1.3	1.5	1.4	1.3
Tape automation	0.5	0.5	0.5	0.5	0.5	0.5
Storage total	1.6	1.7	1.9	2.0	1.9	1.8
Peripherals						
Printers and MFPs	10.8	10.1	9.2	8.6	7.8	7.5
Smart handheld devices	0.6	0.7	0.7	0.7	0.7	0.7
Other add-ons	4.9	4.8	5.2	4.9	4.6	4.6
Peripherals total	16.3	15.6	15.1	14.2	13.1	12.8
Networking equipment	11.6	10.8	10.5	11.2	11.1	10.7
Hardware total	60.6	62.8	61.5	59.7	57.7	56.6
Packaged software total	17.2	16.1	16.3	16.7	17.8	18.3
Services total	22.2	21.1	22.2	23.5	24.4	25.2
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 397

EGYPT PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.2	2.4	2.4	2.5	2.6
Implementation	3.0	3.0	3.1	3.3	3.4	3.4
Maintenance and support	3.0	2.9	2.8	2.8	2.8	2.8
Operations	0.4	0.4	0.5	0.5	0.5	0.6
IT training and education	1.5	1.4	1.6	1.8	2.2	2.6
Services total	2.5	2.5	2.6	2.6	2.7	2.8
Packaged software						
System infrastructure software	2.9	2.8	2.7	2.6	3.0	2.9
Appl. development and deployment	3.3	3.0	2.9	2.9	3.0	3.0
Applications	4.1	4.0	4.1	4.3	4.5	4.5
Packaged software total	3.6	3.5	3.5	3.5	3.7	3.8
Hardware						
Systems						
High-end enterprise servers	1.3	3.1	4.2	2.6	1.7	3.0
Midrange enterprise servers	3.4	3.4	3.3	3.4	3.2	3.0
Volume servers	3.1	2.6	2.9	2.8	2.7	2.6
Servers total	2.9	2.8	3.1	2.9	2.7	2.7
Personal computers	3.7	4.5	4.3	4.1	4.1	4.1
Traditional workstations	5.9	7.4	7.0	6.3	7.1	7.1
Clients total	3.8	4.6	4.4	4.1	4.1	4.1
Systems total	3.6	4.2	4.1	3.9	3.8	3.8
Storage						
Disk systems	2.2	2.4	2.7	2.9	2.7	2.4
Tape automation	3.3	3.4	3.7	3.7	3.5	3.4
Storage total	2.5	2.6	3.0	3.1	2.9	2.6
Peripherals						
Printers and MFPs	6.7	6.5	6.1	5.9	5.6	5.6
Smart handheld devices	7.6	7.1	6.8	6.7	6.2	6.1
Other add-ons	4.6	4.7	4.8	4.4	4.0	4.0
Peripherals total	5.9	5.8	5.6	5.3	4.9	4.9
Networking equipment	5.5	5.1	4.6	4.8	4.7	4.5
Hardware total	4.3	4.6	4.4	4.3	4.1	4.1
Packaged software total	3.6	3.5	3.5	3.5	3.7	3.8
Services total	2.5	2.5	2.6	2.6	2.7	2.8
Total IT	3.6	3.7	3.7	3.6	3.6	3.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 398

EGYPT PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.0	0.0	0.0	0.0	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.0	0.0	0.0	0.0	0.0	0.0
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.0	0.0	0.0	0.0	0.0	0.0
Services total	0.0	0.0	0.0	0.0	0.1	0.1
Packaged software						
System infrastructure software	0.0	0.0	0.0	0.0	0.1	0.1
Appl. development and deployment	0.0	0.0	0.0	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.0
Midrange enterprise servers	0.1	0.1	0.1	0.1	0.1	0.1
Volume servers	0.1	0.1	0.1	0.1	0.1	0.1
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.1	0.1	0.1	0.1	0.1	0.2
Traditional workstations	0.2	0.3	0.3	0.3	0.4	0.4
Clients total	0.1	0.1	0.1	0.1	0.1	0.2
Systems total	0.1	0.1	0.1	0.1	0.1	0.1
Storage						
Disk systems	0.0	0.0	0.0	0.1	0.1	0.1
Tape automation	0.1	0.1	0.1	0.1	0.1	0.1
Storage total	0.0	0.0	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.1	0.1	0.1	0.1	0.1	0.1
Smart handheld devices	0.0	0.0	0.0	0.0	0.0	0.0
Other add-ons	0.2	0.3	0.3	0.3	0.3	0.3
Peripherals total	0.2	0.2	0.1	0.1	0.1	0.1
Networking equipment	0.1	0.1	0.1	0.2	0.2	0.2
Hardware total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.0	0.0	0.0	0.0	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 399

IT SPENDING IN ISRAEL, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	130.0	127.0	133.5	142.6	150.8	157.4
Implementation	583.2	564.3	585.8	616.1	639.9	668.0
Maintenance and support	269.3	265.3	278.5	298.9	316.7	330.6
Operations	191.9	195.5	210.3	229.5	248.2	259.1
IT training and education	65.9	63.9	65.8	71.5	77.2	80.6
Services total	1,240.4	1,216.0	1,274.0	1,358.5	1,432.8	1,495.7
Packaged software						
System infrastructure software	168.6	172.8	180.6	192.0	206.4	220.0
Appl. development and deployment	137.1	138.1	143.4	151.4	161.6	171.3
Applications	272.3	272.1	279.0	290.6	305.0	318.3
Packaged software total	578.0	583.0	603.0	634.0	673.0	709.5
Hardware						
Systems						
High-end enterprise servers	22.6	11.7	18.1	19.3	21.7	25.4
Midrange enterprise servers	61.2	60.9	60.2	62.9	65.4	67.6
Volume servers	165.3	164.0	181.3	192.1	204.8	212.5
Servers total	249.1	236.5	259.6	274.2	291.9	305.5
Personal computers	565.0	521.2	535.9	572.4	605.6	629.8
Traditional workstations	31.9	27.0	22.8	18.8	15.3	11.4
Clients total	597.0	548.2	558.7	591.1	620.9	641.2
Systems total	846.0	784.8	818.3	865.4	912.8	946.7
Storage						
Disk systems	79.0	85.3	95.1	103.0	120.8	140.2
Tape automation	17.0	18.8	18.1	19.8	20.9	24.1
Storage total	96.0	104.1	113.2	122.8	141.7	164.4
Peripherals						
Printers and MFPs	89.1	89.1	92.7	97.2	100.1	104.9
Smart handheld devices	9.4	11.2	14.6	16.5	18.8	19.7
Other add-ons	69.9	75.6	83.6	93.0	104.7	119.4
Peripherals total	168.5	175.9	190.8	206.7	223.5	244.0
Networking equipment	213.1	216.1	230.0	251.0	265.6	272.3
Hardware total	1,323.7	1,280.8	1,352.3	1,445.8	1,543.6	1,627.4
Packaged software total	578.0	583.0	603.0	634.0	673.0	709.5
Services total	1,240.4	1,216.0	1,274.0	1,358.5	1,432.8	1,495.7
Total IT	3,142.0	3,079.9	3,229.2	3,438.3	3,649.4	3,832.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 400

GROWTH IN IT SPENDING IN ISRAEL, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	-2.4	5.1	6.8	5.8	4.4	5.5
Implementation	-3.2	3.8	5.2	3.9	4.4	4.3
Maintenance and support	-1.5	5.0	7.3	6.0	4.4	5.7
Operations	1.9	7.6	9.1	8.2	4.4	7.3
IT training and education	-3.0	3.0	8.6	8.0	4.4	6.0
Services total	-2.0	4.8	6.6	5.5	4.4	5.3
Packaged software						
System infrastructure software	2.5	4.5	6.3	7.5	6.6	6.2
Appl. development and deployment	0.7	3.8	5.6	6.8	6.0	5.5
Applications	-0.1	2.6	4.1	5.0	4.3	4.0
Packaged software total	0.9	3.4	5.1	6.2	5.4	5.0
Hardware						
Systems						
High-end enterprise servers	-48.1	54.6	6.5	12.7	16.9	21.4
Midrange enterprise servers	-0.5	-1.1	4.5	4.0	3.3	2.6
Volume servers	-0.8	10.6	5.9	6.6	3.8	6.7
Servers total	-5.0	9.7	5.6	6.4	4.7	6.6
Personal computers	-7.8	2.8	6.8	5.8	4.0	4.8
Traditional workstations	-15.5	-15.4	-17.8	-18.5	-25.4	-19.4
Clients total	-7.8	2.8	6.8	5.8	4.0	4.8
Systems total	-7.2	4.3	5.8	5.5	3.7	4.8
Storage						
Disk systems	7.9	11.5	8.4	17.2	16.1	13.2
Tape automation	10.6	-3.8	9.2	5.6	15.6	6.4
Storage total	8.4	8.7	8.5	15.4	16.0	12.1
Peripherals						
Printers and MFPs	-0.1	4.0	4.9	2.9	4.9	4.2
Smart handheld devices	18.8	29.7	13.0	14.2	4.7	15.0
Other add-ons	8.1	10.6	11.3	12.5	14.1	12.1
Peripherals total	4.4	8.5	8.3	8.1	9.2	8.5
Networking equipment	1.4	6.4	9.1	5.8	2.5	6.0
Hardware total	-3.2	5.6	6.9	6.8	5.4	6.2
Packaged software total	0.9	3.4	5.1	6.2	5.4	5.0
Services total	-2.0	4.8	6.6	5.5	4.4	5.3
Total IT	-2.0	4.8	6.5	6.1	5.0	5.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 401

PROPORTIONS OF IT SPENDING CATEGORIES IN ISRAEL, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.1	4.1	4.1	4.1	4.1	4.1
Implementation	18.6	18.3	18.1	17.9	17.5	17.4
Maintenance and support	8.6	8.6	8.6	8.7	8.7	8.6
Operations	6.1	6.3	6.5	6.7	6.8	6.8
IT training and education	2.1	2.1	2.0	2.1	2.1	2.1
Services total	39.5	39.5	39.5	39.5	39.3	39.0
Packaged software						
System infrastructure software	5.4	5.6	5.6	5.6	5.7	5.7
Appl. development and deployment	4.4	4.5	4.4	4.4	4.4	4.5
Applications	8.7	8.8	8.6	8.5	8.4	8.3
Packaged software total	18.4	18.9	18.7	18.4	18.4	18.5
Hardware						
Systems						
High-end enterprise servers	0.7	0.4	0.6	0.6	0.6	0.7
Midrange enterprise servers	1.9	2.0	1.9	1.8	1.8	1.8
Volume servers	5.3	5.3	5.6	5.6	5.6	5.5
Servers total	7.9	7.7	8.0	8.0	8.0	8.0
Personal computers	18.0	16.9	16.6	16.6	16.6	16.4
Traditional workstations	1.0	0.9	0.7	0.5	0.4	0.3
Clients total	18.0	16.9	16.6	16.6	16.6	16.4
Systems total	26.9	25.5	25.3	25.2	25.0	24.7
Storage						
Disk systems	2.5	2.8	2.9	3.0	3.3	3.7
Tape automation	0.5	0.6	0.6	0.6	0.6	0.6
Storage total	3.1	3.4	3.5	3.6	3.9	4.3
Peripherals						
Printers and MFPs	2.8	2.9	2.9	2.8	2.7	2.7
Smart handheld devices	0.3	0.4	0.5	0.5	0.5	0.5
Other add-ons	2.2	2.5	2.6	2.7	2.9	3.1
Peripherals total	5.4	5.7	5.9	6.0	6.1	6.4
Networking equipment	6.8	7.0	7.1	7.3	7.3	7.1
Hardware total	42.1	41.6	41.9	42.1	42.3	42.5
Packaged software total	18.4	18.9	18.7	18.4	18.4	18.5
Services total	39.5	39.5	39.5	39.5	39.3	39.0
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 402

ISRAEL PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	23.3	21.0	19.4	18.1	17.2	16.2
Implementation	25.6	22.7	20.7	19.0	17.5	16.3
Maintenance and support	20.8	18.9	17.8	17.1	16.5	15.5
Operations	31.7	28.7	27.1	26.1	25.3	24.1
IT training and education	27.7	24.3	21.5	20.0	18.9	17.6
Services total	25.0	22.4	20.7	19.3	18.3	17.1
Packaged software						
System infrastructure software	24.7	22.8	20.5	19.0	18.1	17.4
Appl. development and deployment	25.0	22.8	20.7	19.0	17.8	16.8
Applications	19.0	17.5	16.1	15.0	14.4	13.3
Packaged software total	21.7	20.0	18.3	16.9	16.2	15.2
Hardware						
Systems						
High-end enterprise servers	18.0	11.8	17.6	18.2	20.3	21.7
Midrange enterprise servers	22.9	23.1	20.1	19.4	19.2	18.4
Volume servers	25.1	23.0	21.6	20.7	19.8	18.7
Servers total	23.7	22.0	20.9	20.2	19.7	18.9
Personal computers	14.9	12.7	11.7	11.2	10.7	10.1
Traditional workstations	52.2	47.8	42.1	36.2	31.3	26.0
Clients total	15.5	13.2	12.0	11.4	10.9	10.2
Systems total	17.3	15.0	13.9	13.3	12.7	12.0
Storage						
Disk systems	28.7	27.8	27.7	26.3	26.5	27.1
Tape automation	19.1	19.2	18.1	18.0	18.0	18.6
Storage total	26.3	25.7	25.5	24.5	24.8	25.4
Peripherals						
Printers and MFPs	9.7	9.0	8.8	8.5	8.2	8.2
Smart handheld devices	20.2	18.4	19.2	18.7	18.6	17.7
Other add-ons	11.7	11.6	10.9	10.6	10.6	10.7
Peripherals total	10.8	10.4	10.1	9.8	9.7	9.7
Networking equipment	17.9	16.3	14.4	13.8	12.9	11.9
Hardware total	16.5	14.8	13.8	13.2	12.7	12.2
Packaged software total	21.7	20.0	18.3	16.9	16.2	15.2
Services total	25.0	22.4	20.7	19.3	18.3	17.1
Total IT	20.1	18.1	16.7	15.8	15.1	14.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 403

ISRAEL PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.4	0.3	0.3	0.4	0.4	0.3
Implementation	0.4	0.4	0.4	0.4	0.4	0.4
Maintenance and support	0.3	0.3	0.3	0.3	0.3	0.3
Operations	0.3	0.3	0.3	0.3	0.3	0.3
IT training and education	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.4	0.3	0.3	0.3	0.3	0.3
Packaged software						
System infrastructure software	0.4	0.4	0.4	0.4	0.3	0.3
Appl. development and deployment	0.4	0.3	0.3	0.3	0.3	0.3
Applications	0.3	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Hardware						
Systems						
High-end enterprise servers	0.2	0.1	0.2	0.2	0.2	0.2
Midrange enterprise servers	0.4	0.5	0.4	0.4	0.4	0.4
Volume servers	0.8	0.7	0.8	0.7	0.7	0.7
Servers total	0.5	0.5	0.5	0.5	0.5	0.5
Personal computers	0.4	0.4	0.4	0.4	0.4	0.4
Traditional workstations	1.4	1.6	1.8	1.8	1.7	1.5
Clients total	0.4	0.4	0.4	0.4	0.4	0.4
Systems total	0.4	0.4	0.4	0.4	0.4	0.4
Storage						
Disk systems	0.4	0.4	0.4	0.5	0.5	0.6
Tape automation	0.6	0.6	0.6	0.6	0.6	0.7
Storage total	0.4	0.4	0.5	0.5	0.5	0.6
Peripherals						
Printers and MFPs	0.2	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.1
Other add-ons	0.5	0.7	0.7	0.8	0.8	0.9
Peripherals total	0.3	0.3	0.3	0.3	0.2	0.2
Networking equipment	0.4	0.4	0.4	0.4	0.4	0.4
Hardware total	0.4	0.4	0.4	0.4	0.4	0.4
Packaged software total	0.3	0.3	0.3	0.3	0.3	0.3
Services total	0.4	0.3	0.3	0.3	0.3	0.3
Total IT	0.4	0.4	0.4	0.4	0.4	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 404

IT SPENDING IN THE REST OF MIDDLE EAST/AFRICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	75.0	83.9	98.2	111.6	128.1	148.7
Implementation	387.8	462.4	550.4	665.6	795.5	950.6
Maintenance and support	219.1	247.9	284.1	325.3	358.5	408.0
Operations	24.7	32.3	38.4	47.2	60.5	70.3
IT training and education	52.3	61.2	76.9	93.4	108.6	127.6
Services total	758.9	887.8	1,048.0	1,243.1	1,451.3	1,705.3
Packaged software						
System infrastructure software	102.3	112.4	128.6	152.5	176.2	201.0
Appl. development and deployment	90.1	99.3	110.7	125.9	145.1	164.4
Applications	214.5	243.4	287.1	343.3	398.3	467.4
Packaged software total	406.9	455.2	526.3	621.7	719.6	832.8
Hardware						
Systems						
High-end enterprise servers	3.5	1.1	6.6	12.6	19.5	21.5
Midrange enterprise servers	33.2	31.9	45.9	51.7	58.3	65.4
Volume servers	183.8	218.5	253.6	298.0	341.6	390.2
Servers total	220.5	251.6	306.2	362.3	419.4	477.1
Personal computers	1,338.2	1,461.1	1,641.5	1,808.0	2,011.4	2,221.0
Traditional workstations	10.2	9.2	10.4	11.8	12.2	12.3
Clients total	1,348.4	1,470.3	1,652.0	1,819.8	2,023.5	2,233.4
Systems total	1,568.9	1,721.8	1,958.1	2,182.1	2,443.0	2,710.5
Storage						
Disk systems	36.2	43.0	51.6	62.0	78.8	97.7
Tape automation	14.4	16.9	18.8	22.0	25.0	29.0
Storage total	50.6	59.9	70.4	84.0	103.8	126.6
Peripherals						
Printers and MFPs	307.8	340.1	388.3	443.3	491.9	540.7
Smart handheld devices	10.3	14.8	20.3	25.3	31.3	36.8
Other add-ons	125.6	151.6	186.1	227.9	270.9	319.9
Peripherals total	443.7	506.5	594.8	696.5	794.1	897.4
Networking equipment	243.9	302.9	378.9	448.4	539.1	635.0
Hardware total	2,307.1	2,591.2	3,002.2	3,410.9	3,879.9	4,369.5
Packaged software total	406.9	455.2	526.3	621.7	719.6	832.8
Services total	758.9	887.8	1,048.0	1,243.1	1,451.3	1,705.3
Total IT	3,472.9	3,934.1	4,576.5	5,275.8	6,050.8	6,907.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 405

GROWTH IN IT SPENDING IN THE REST OF MIDDLE EAST/AFRICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	12.0	17.0	13.7	14.8	16.0	15.4
Implementation	19.2	19.0	20.9	19.5	19.5	19.7
Maintenance and support	13.1	14.6	14.5	10.2	13.8	13.3
Operations	30.4	19.2	22.7	28.3	16.2	21.5
IT training and education	17.1	25.5	21.5	16.3	17.5	20.1
Services total	17.0	18.0	18.6	16.7	17.5	17.7
Packaged software						
System infrastructure software	9.9	14.3	18.6	15.5	14.1	15.6
Appl. development and deployment	10.2	11.5	13.7	15.2	13.3	13.4
Applications	13.5	17.9	19.6	16.0	17.3	17.7
Packaged software total	11.9	15.6	18.1	15.7	15.7	16.3
Hardware						
Systems						
High-end enterprise servers	-68.4	486.6	91.6	55.2	9.8	109.2
Midrange enterprise servers	-3.8	44.0	12.5	12.9	12.1	19.7
Volume servers	18.9	16.1	17.5	14.6	14.2	15.6
Servers total	14.1	21.7	18.3	15.8	13.7	17.4
Personal computers	9.2	12.3	10.1	11.2	10.4	11.0
Traditional workstations	-10.3	13.4	13.1	3.3	1.4	7.6
Clients total	9.2	12.3	10.1	11.2	10.4	11.0
Systems total	9.7	13.7	11.4	12.0	10.9	12.0
Storage						
Disk systems	18.8	20.0	20.1	27.2	23.9	22.8
Tape automation	17.4	11.1	17.0	13.4	16.1	14.4
Storage total	18.4	17.5	19.2	23.6	22.0	20.6
Peripherals						
Printers and MFPs	10.5	14.2	14.2	11.0	9.9	12.3
Smart handheld devices	44.5	37.1	24.5	23.7	17.4	25.5
Other add-ons	20.7	22.8	22.4	18.9	18.1	20.5
Peripherals total	14.2	17.4	17.1	14.0	13.0	15.4
Networking equipment	24.2	25.1	18.4	20.2	17.8	20.3
Hardware total	12.3	15.9	13.6	13.7	12.6	14.0
Packaged software total	11.9	15.6	18.1	15.7	15.7	16.3
Services total	17.0	18.0	18.6	16.7	17.5	17.7
Total IT	13.3	16.3	15.3	14.7	14.2	15.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 406

PROPORTIONS OF IT SPENDING CATEGORIES IN THE REST OF MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.2	2.1	2.1	2.1	2.1	2.2
Implementation	11.2	11.8	12.0	12.6	13.1	13.8
Maintenance and support	6.3	6.3	6.2	6.2	5.9	5.9
Operations	0.7	0.8	0.8	0.9	1.0	1.0
IT training and education	1.5	1.6	1.7	1.8	1.8	1.8
Services total	21.9	22.6	22.9	23.6	24.0	24.7
Packaged software						
System infrastructure software	2.9	2.9	2.8	2.9	2.9	2.9
Appl. development and deployment	2.6	2.5	2.4	2.4	2.4	2.4
Applications	6.2	6.2	6.3	6.5	6.6	6.8
Packaged software total	11.7	11.6	11.5	11.8	11.9	12.1
Hardware						
Systems						
High-end enterprise servers	0.1	0.0	0.1	0.2	0.3	0.3
Midrange enterprise servers	1.0	0.8	1.0	1.0	1.0	0.9
Volume servers	5.3	5.6	5.5	5.6	5.6	5.6
Servers total	6.3	6.4	6.7	6.9	6.9	6.9
Personal computers	38.5	37.1	35.9	34.3	33.2	32.2
Traditional workstations	0.3	0.2	0.2	0.2	0.2	0.2
Clients total	38.5	37.1	35.9	34.3	33.2	32.2
Systems total	45.2	43.8	42.8	41.4	40.4	39.2
Storage						
Disk systems	1.0	1.1	1.1	1.2	1.3	1.4
Tape automation	0.4	0.4	0.4	0.4	0.4	0.4
Storage total	1.5	1.5	1.5	1.6	1.7	1.8
Peripherals						
Printers and MFPs	8.9	8.6	8.5	8.4	8.1	7.8
Smart handheld devices	0.3	0.4	0.4	0.5	0.5	0.5
Other add-ons	3.6	3.9	4.1	4.3	4.5	4.6
Peripherals total	12.8	12.9	13.0	13.2	13.1	13.0
Networking equipment	7.0	7.7	8.3	8.5	8.9	9.2
Hardware total	66.4	65.9	65.6	64.7	64.1	63.3
Packaged software total	11.7	11.6	11.5	11.8	11.9	12.1
Services total	21.9	22.6	22.9	23.6	24.0	24.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 407

REST OF MIDDLE EAST/AFRICA PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	13.4	13.9	14.3	14.2	14.6	15.3
Implementation	17.0	18.6	19.5	20.5	21.8	23.2
Maintenance and support	17.0	17.7	18.2	18.6	18.7	19.2
Operations	4.1	4.7	5.0	5.4	6.2	6.5
IT training and education	22.0	23.3	25.1	26.1	26.6	27.9
Services total	15.3	16.3	17.0	17.7	18.5	19.5
Packaged software						
System infrastructure software	15.0	14.8	14.6	15.1	15.5	15.9
Appl. development and deployment	16.4	16.4	16.0	15.8	16.0	16.2
Applications	15.0	15.6	16.6	17.8	18.8	19.5
Packaged software total	15.3	15.6	15.9	16.6	17.3	17.8
Hardware						
Systems						
High-end enterprise servers	2.8	1.1	6.4	11.9	18.2	18.3
Midrange enterprise servers	12.4	12.1	15.3	15.9	17.1	17.8
Volume servers	28.0	30.6	30.3	32.1	33.0	34.4
Servers total	21.0	23.4	24.7	26.7	28.3	29.5
Personal computers	35.3	35.7	35.8	35.4	35.5	35.5
Traditional workstations	16.7	16.3	19.2	22.8	24.9	28.1
Clients total	35.1	35.4	35.6	35.2	35.4	35.4
Systems total	32.0	32.9	33.3	33.5	33.9	34.2
Storage						
Disk systems	13.1	14.0	15.0	15.8	17.3	18.9
Tape automation	16.2	17.3	18.8	20.1	21.5	22.3
Storage total	13.9	14.8	15.9	16.8	18.1	19.6
Peripherals						
Printers and MFPs	33.5	34.5	36.8	38.9	40.4	42.0
Smart handheld devices	21.9	24.3	26.8	28.9	31.0	33.1
Other add-ons	21.0	23.3	24.3	25.9	27.3	28.8
Peripherals total	28.4	29.8	31.4	33.0	34.4	35.8
Networking equipment	20.5	22.8	23.7	24.6	26.1	27.9
Hardware total	28.8	29.9	30.6	31.1	31.9	32.7
Packaged software total	15.3	15.6	15.9	16.6	17.3	17.8
Services total	15.3	16.3	17.0	17.7	18.5	19.5
Total IT	22.2	23.1	23.7	24.3	25.1	25.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 408

REST OF MIDDLE EAST/AFRICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.3	0.3	0.3	0.3
Implementation	0.3	0.3	0.4	0.5	0.5	0.6
Maintenance and support	0.2	0.3	0.3	0.3	0.3	0.3
Operations	0.0	0.0	0.1	0.1	0.1	0.1
IT training and education	0.2	0.3	0.4	0.4	0.5	0.5
Services total	0.2	0.2	0.3	0.3	0.3	0.4
Packaged software						
System infrastructure software	0.2	0.2	0.3	0.3	0.3	0.3
Appl. development and deployment	0.2	0.2	0.3	0.3	0.3	0.3
Applications	0.2	0.3	0.3	0.3	0.4	0.4
Packaged software total	0.2	0.3	0.3	0.3	0.3	0.4
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.1	0.1	0.2	0.2
Midrange enterprise servers	0.2	0.2	0.3	0.4	0.4	0.4
Volume servers	0.9	1.0	1.1	1.2	1.2	1.3
Servers total	0.4	0.5	0.6	0.7	0.8	0.9
Personal computers	0.9	1.0	1.1	1.2	1.3	1.3
Traditional workstations	0.4	0.5	0.8	1.1	1.4	1.6
Clients total	0.9	1.0	1.1	1.2	1.3	1.4
Systems total	0.8	0.9	1.0	1.0	1.1	1.2
Storage						
Disk systems	0.2	0.2	0.2	0.3	0.3	0.4
Tape automation	0.5	0.6	0.6	0.7	0.7	0.8
Storage total	0.2	0.2	0.3	0.3	0.4	0.5
Peripherals						
Printers and MFPs	0.7	0.8	0.9	1.0	1.0	1.1
Smart handheld devices	0.1	0.1	0.1	0.1	0.1	0.1
Other add-ons	1.0	1.3	1.6	1.9	2.1	2.4
Peripherals total	0.7	0.8	0.8	0.9	0.9	0.9
Networking equipment	0.5	0.6	0.7	0.8	0.9	0.9
Hardware total	0.7	0.8	0.9	0.9	1.0	1.1
Packaged software total	0.2	0.3	0.3	0.3	0.3	0.4
Services total	0.2	0.2	0.3	0.3	0.3	0.4
Total IT	0.4	0.5	0.5	0.5	0.6	0.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 409

IT SPENDING IN SAUDI ARABIA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	83.2	88.6	99.3	113.2	129.1	144.8
Implementation	329.2	351.2	390.9	444.2	505.0	566.3
Maintenance and support	194.6	205.8	224.3	247.3	273.1	306.2
Operations	13.6	15.2	17.4	20.4	24.4	27.4
IT training and education	40.0	44.6	51.6	59.6	68.9	77.3
Services total	660.6	705.4	783.4	884.6	1,000.6	1,122.0
Packaged software						
System infrastructure software	89.4	98.6	108.7	119.3	130.5	141.3
Appl. development and deployment	69.3	78.8	88.5	97.6	108.3	119.4
Applications	171.1	188.1	208.3	231.3	258.4	284.3
Packaged software total	329.9	365.6	405.6	448.3	497.3	545.1
Hardware						
Systems						
High-end enterprise servers	16.4	12.6	9.2	17.4	14.4	14.6
Midrange enterprise servers	34.9	34.3	37.7	42.8	43.7	44.5
Volume servers	43.9	62.7	68.6	75.7	85.0	95.7
Servers total	95.2	109.5	115.5	135.9	143.1	154.7
Personal computers	342.6	353.6	427.1	527.4	626.1	708.4
Traditional workstations	4.0	4.1	4.2	4.2	3.6	3.1
Clients total	346.5	357.7	431.3	531.5	629.7	711.5
Systems total	441.7	467.2	546.8	667.4	772.7	866.2
Storage						
Disk systems	46.0	40.9	41.9	42.3	44.6	49.2
Tape automation	8.7	9.1	9.2	9.4	9.8	10.9
Storage total	54.7	50.0	51.1	51.8	54.4	60.1
Peripherals						
Printers and MFPs	108.7	121.5	133.8	145.2	160.4	161.8
Smart handheld devices	6.4	8.5	9.4	10.7	12.6	13.9
Other add-ons	52.6	60.6	69.4	80.5	86.6	96.0
Peripherals total	167.7	190.6	212.6	236.4	259.6	271.7
Networking equipment	119.2	142.3	169.6	197.5	226.2	239.9
Hardware total	783.4	850.0	980.2	1,153.1	1,312.9	1,437.9
Packaged software total	329.9	365.6	405.6	448.3	497.3	545.1
Services total	660.6	705.4	783.4	884.6	1,000.6	1,122.0
Total IT	1,773.9	1,920.9	2,169.1	2,486.0	2,810.8	3,105.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 410

GROWTH IN IT SPENDING IN SAUDI ARABIA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	6.4	12.1	14.0	14.0	12.1	13.1
Implementation	6.7	11.3	13.6	13.7	12.1	12.7
Maintenance and support	5.8	9.0	10.2	10.4	12.1	10.4
Operations	11.4	14.5	17.3	19.8	12.1	15.9
IT training and education	11.4	15.6	15.6	15.6	12.1	14.7
Services total	6.8	11.1	12.9	13.1	12.1	12.3
Packaged software						
System infrastructure software	10.3	10.2	9.7	9.4	8.3	9.4
Appl. development and deployment	13.7	12.3	10.3	10.9	10.2	10.9
Applications	10.0	10.7	11.0	11.7	10.0	10.9
Packaged software total	10.8	10.9	10.5	10.9	9.6	10.5
Hardware						
Systems						
High-end enterprise servers	-23.5	-26.4	88.4	-17.2	1.1	3.8
Midrange enterprise servers	-1.8	10.0	13.5	2.1	1.9	6.8
Volume servers	42.7	9.4	10.4	12.3	12.6	11.2
Servers total	15.0	5.5	17.6	5.3	8.2	9.0
Personal computers	3.2	20.8	23.5	18.7	13.1	19.0
Traditional workstations	3.5	2.4	-1.2	-14.2	-12.1	-6.5
Clients total	3.2	20.8	23.5	18.7	13.1	19.0
Systems total	5.8	17.0	22.1	15.8	12.1	16.7
Storage						
Disk systems	-11.0	2.4	1.0	5.3	10.4	4.7
Tape automation	3.8	1.6	2.6	3.9	10.6	4.6
Storage total	-8.7	2.3	1.3	5.1	10.5	4.7
Peripherals						
Printers and MFPs	11.8	10.1	8.5	10.5	0.9	7.4
Smart handheld devices	31.2	11.7	13.0	18.4	9.8	13.2
Other add-ons	15.1	14.6	16.1	7.5	10.9	12.2
Peripherals total	13.6	11.6	11.2	9.8	4.7	9.3
Networking equipment	19.3	19.2	16.4	14.5	6.0	14.0
Hardware total	8.5	15.3	17.6	13.9	9.5	14.0
Packaged software total	10.8	10.9	10.5	10.9	9.6	10.5
Services total	6.8	11.1	12.9	13.1	12.1	12.3
Total IT	8.3	12.9	14.6	13.1	10.5	12.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 411

PROPORTIONS OF IT SPENDING CATEGORIES IN SAUDI ARABIA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.7	4.6	4.6	4.6	4.6	4.7
Implementation	18.6	18.3	18.0	17.9	18.0	18.2
Maintenance and support	11.0	10.7	10.3	9.9	9.7	9.9
Operations	0.8	0.8	0.8	0.8	0.9	0.9
IT training and education	2.3	2.3	2.4	2.4	2.5	2.5
Services total	37.2	36.7	36.1	35.6	35.6	36.1
Packaged software						
System infrastructure software	5.0	5.1	5.0	4.8	4.6	4.6
Appl. development and deployment	3.9	4.1	4.1	3.9	3.9	3.8
Applications	9.6	9.8	9.6	9.3	9.2	9.2
Packaged software total	18.6	19.0	18.7	18.0	17.7	17.6
Hardware						
Systems						
High-end enterprise servers	0.9	0.7	0.4	0.7	0.5	0.5
Midrange enterprise servers	2.0	1.8	1.7	1.7	1.6	1.4
Volume servers	2.5	3.3	3.2	3.0	3.0	3.1
Servers total	5.4	5.7	5.3	5.5	5.1	5.0
Personal computers	19.3	18.4	19.7	21.2	22.3	22.8
Traditional workstations	0.2	0.2	0.2	0.2	0.1	0.1
Clients total	19.3	18.4	19.7	21.2	22.3	22.8
Systems total	24.9	24.3	25.2	26.8	27.5	27.9
Storage						
Disk systems	2.6	2.1	1.9	1.7	1.6	1.6
Tape automation	0.5	0.5	0.4	0.4	0.3	0.3
Storage total	3.1	2.6	2.4	2.1	1.9	1.9
Peripherals						
Printers and MFPs	6.1	6.3	6.2	5.8	5.7	5.2
Smart handheld devices	0.4	0.4	0.4	0.4	0.4	0.4
Other add-ons	3.0	3.2	3.2	3.2	3.1	3.1
Peripherals total	9.5	9.9	9.8	9.5	9.2	8.8
Networking equipment	6.7	7.4	7.8	7.9	8.0	7.7
Hardware total	44.2	44.2	45.2	46.4	46.7	46.3
Packaged software total	18.6	19.0	18.7	18.0	17.7	17.6
Services total	37.2	36.7	36.1	35.6	35.6	36.1
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 412

SAUDI ARABIA PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	14.9	14.7	14.4	14.4	14.8	14.9
Implementation	14.5	14.1	13.8	13.7	13.8	13.8
Maintenance and support	15.1	14.7	14.3	14.1	14.2	14.4
Operations	2.2	2.2	2.2	2.3	2.5	2.5
IT training and education	16.8	17.0	16.8	16.7	16.9	16.9
Services total	13.3	13.0	12.7	12.6	12.8	12.9
Packaged software						
System infrastructure software	13.1	13.0	12.4	11.8	11.5	11.2
Appl. development and deployment	12.6	13.0	12.8	12.2	11.9	11.7
Applications	11.9	12.1	12.0	12.0	12.2	11.8
Packaged software total	12.4	12.5	12.3	12.0	11.9	11.6
Hardware						
Systems						
High-end enterprise servers	13.1	12.6	9.0	16.5	13.5	12.4
Midrange enterprise servers	13.1	13.0	12.6	13.2	12.8	12.1
Volume servers	6.7	8.8	8.2	8.2	8.2	8.4
Servers total	9.1	10.2	9.3	10.0	9.6	9.6
Personal computers	9.0	8.6	9.3	10.3	11.0	11.3
Traditional workstations	6.5	7.3	7.8	8.0	7.3	7.1
Clients total	9.0	8.6	9.3	10.3	11.0	11.3
Systems total	9.0	8.9	9.3	10.2	10.7	10.9
Storage						
Disk systems	16.7	13.3	12.2	10.8	9.8	9.5
Tape automation	9.8	9.3	9.2	8.6	8.4	8.4
Storage total	15.0	12.4	11.5	10.3	9.5	9.3
Peripherals						
Printers and MFPs	11.8	12.3	12.7	12.7	13.2	12.6
Smart handheld devices	13.8	13.9	12.4	12.2	12.5	12.5
Other add-ons	8.8	9.3	9.1	9.1	8.7	8.6
Peripherals total	10.7	11.2	11.2	11.2	11.2	10.8
Networking equipment	10.0	10.7	10.6	10.9	11.0	10.5
Hardware total	9.8	9.8	10.0	10.5	10.8	10.8
Packaged software total	12.4	12.5	12.3	12.0	11.9	11.6
Services total	13.3	13.0	12.7	12.6	12.8	12.9
Total IT	11.3	11.3	11.2	11.4	11.6	11.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 413

SAUDI ARABIA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.2	0.2	0.3	0.3	0.3	0.3
Implementation	0.2	0.3	0.3	0.3	0.3	0.3
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.2	0.2	0.2	0.3	0.3	0.3
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.2	0.2	0.2	0.2	0.2	0.2
Appl. development and deployment	0.2	0.2	0.2	0.2	0.2	0.2
Applications	0.2	0.2	0.2	0.2	0.2	0.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.2	0.1	0.1
Midrange enterprise servers	0.2	0.3	0.3	0.3	0.3	0.3
Volume servers	0.2	0.3	0.3	0.3	0.3	0.3
Servers total	0.2	0.2	0.2	0.3	0.3	0.3
Personal computers	0.2	0.2	0.3	0.3	0.4	0.4
Traditional workstations	0.2	0.2	0.3	0.4	0.4	0.4
Clients total	0.2	0.2	0.3	0.3	0.4	0.4
Systems total	0.2	0.2	0.3	0.3	0.4	0.4
Storage						
Disk systems	0.2	0.2	0.2	0.2	0.2	0.2
Tape automation	0.3	0.3	0.3	0.3	0.3	0.3
Storage total	0.2	0.2	0.2	0.2	0.2	0.2
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.1	0.1	0.1	0.0	0.0	0.0
Other add-ons	0.4	0.5	0.6	0.7	0.7	0.7
Peripherals total	0.3	0.3	0.3	0.3	0.3	0.3
Networking equipment	0.2	0.3	0.3	0.4	0.4	0.4
Hardware total	0.2	0.3	0.3	0.3	0.3	0.3
Packaged software total	0.2	0.2	0.2	0.2	0.2	0.2
Services total	0.2	0.2	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.2	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 414

IT SPENDING IN SOUTH AFRICA, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	197.2	220.9	250.4	281.9	313.8	347.5
Implementation	624.1	706.1	798.8	896.7	998.6	1,105.7
Maintenance and support	376.5	425.6	479.6	531.9	583.9	646.6
Operations	336.5	391.7	452.5	513.4	573.9	635.4
IT training and education	48.9	58.0	69.2	79.8	90.9	100.6
Services total	1,583.1	1,802.3	2,050.5	2,303.6	2,561.1	2,835.8
Packaged software						
System infrastructure software	212.4	246.8	289.4	338.1	391.8	447.9
Appl. development and deployment	181.9	213.2	252.2	302.1	354.7	408.9
Applications	500.2	558.7	615.7	674.2	729.5	861.6
Packaged software total	894.5	1,018.7	1,157.4	1,314.4	1,476.0	1,718.4
Hardware						
Systems						
High-end enterprise servers	77.2	66.2	59.3	44.8	39.8	37.9
Midrange enterprise servers	83.3	84.4	86.3	87.5	89.8	92.0
Volume servers	137.1	135.9	160.9	169.1	181.6	186.0
Servers total	297.6	286.6	306.5	301.4	311.2	315.8
Personal computers	732.2	759.3	835.3	899.4	930.0	939.0
Traditional workstations	7.8	7.5	7.3	7.0	6.6	6.1
Clients total	740.0	766.8	842.6	906.3	936.6	945.1
Systems total	1,037.6	1,053.4	1,149.0	1,207.8	1,247.8	1,260.9
Storage						
Disk systems	58.4	70.4	77.6	83.3	90.6	98.2
Tape automation	35.3	37.8	35.4	36.2	35.4	37.6
Storage total	93.7	108.2	113.0	119.5	126.0	135.8
Peripherals						
Printers and MFPs	163.7	165.5	167.9	171.7	175.5	180.7
Smart handheld devices	6.2	8.3	10.0	10.9	12.0	12.7
Other add-ons	243.4	256.4	269.6	283.4	299.8	316.0
Peripherals total	413.4	430.2	447.5	465.9	487.2	509.3
Networking equipment	248.5	264.4	284.0	300.5	315.5	331.1
Hardware total	1,793.2	1,856.2	1,993.5	2,093.7	2,176.5	2,237.2
Packaged software total	894.5	1,018.7	1,157.4	1,314.4	1,476.0	1,718.4
Services total	1,583.1	1,802.3	2,050.5	2,303.6	2,561.1	2,835.8
Total IT	4,270.7	4,677.1	5,201.4	5,711.7	6,213.6	6,791.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 415

GROWTH IN IT SPENDING IN SOUTH AFRICA, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	12.0	13.3	12.6	11.3	10.7	12.0
Implementation	13.1	13.1	12.3	11.4	10.7	11.9
Maintenance and support	13.0	12.7	10.9	9.8	10.7	11.0
Operations	16.4	15.5	13.5	11.8	10.7	12.9
IT training and education	18.7	19.2	15.3	13.9	10.7	14.8
Services total	13.8	13.8	12.3	11.2	10.7	12.0
Packaged software						
System infrastructure software	16.2	17.3	16.8	15.9	14.3	16.1
Appl. development and deployment	17.2	18.3	19.8	17.4	15.3	17.7
Applications	11.7	10.2	9.5	8.2	18.1	11.4
Packaged software total	13.9	13.6	13.6	12.3	16.4	14.0
Hardware						
Systems						
High-end enterprise servers	-14.3	-10.4	-24.4	-11.2	-4.8	-13.0
Midrange enterprise servers	1.4	2.2	1.5	2.6	2.5	2.2
Volume servers	-0.9	18.4	5.1	7.4	2.4	8.2
Servers total	-3.7	6.9	-1.6	3.2	1.5	2.5
Personal computers	3.7	10.0	7.7	3.4	1.0	5.5
Traditional workstations	-4.1	-2.9	-4.4	-4.6	-7.7	-4.9
Clients total	3.7	10.0	7.7	3.4	1.0	5.5
Systems total	1.5	9.1	5.1	3.3	1.0	4.6
Storage						
Disk systems	20.6	10.3	7.3	8.7	8.4	8.7
Tape automation	7.1	-6.5	2.3	-2.2	6.3	-0.2
Storage total	15.5	4.4	5.7	5.4	7.8	5.8
Peripherals						
Printers and MFPs	1.0	1.5	2.3	2.2	3.0	2.2
Smart handheld devices	33.8	20.7	8.6	10.0	5.8	11.1
Other add-ons	5.3	5.2	5.1	5.8	5.4	5.4
Peripherals total	4.1	4.0	4.1	4.6	4.5	4.3
Networking equipment	6.4	7.4	5.8	5.0	5.0	5.8
Hardware total	3.5	7.4	5.0	4.0	2.8	4.8
Packaged software total	13.9	13.6	13.6	12.3	16.4	14.0
Services total	13.8	13.8	12.3	11.2	10.7	12.0
Total IT	9.5	11.2	9.8	8.8	9.3	9.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 416

PROPORTIONS OF IT SPENDING CATEGORIES IN SOUTH AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.6	4.7	4.8	4.9	5.1	5.1
Implementation	14.6	15.1	15.4	15.7	16.1	16.3
Maintenance and support	8.8	9.1	9.2	9.3	9.4	9.5
Operations	7.9	8.4	8.7	9.0	9.2	9.4
IT training and education	1.1	1.2	1.3	1.4	1.5	1.5
Services total	37.1	38.5	39.4	40.3	41.2	41.8
Packaged software						
System infrastructure software	5.0	5.3	5.6	5.9	6.3	6.6
Appl. development and deployment	4.3	4.6	4.8	5.3	5.7	6.0
Applications	11.7	11.9	11.8	11.8	11.7	12.7
Packaged software total	20.9	21.8	22.3	23.0	23.8	25.3
Hardware						
Systems						
High-end enterprise servers	1.8	1.4	1.1	0.8	0.6	0.6
Midrange enterprise servers	1.9	1.8	1.7	1.5	1.4	1.4
Volume servers	3.2	2.9	3.1	3.0	2.9	2.7
Servers total	7.0	6.1	5.9	5.3	5.0	4.7
Personal computers	17.1	16.2	16.1	15.7	15.0	13.8
Traditional workstations	0.2	0.2	0.1	0.1	0.1	0.1
Clients total	17.1	16.2	16.1	15.7	15.0	13.8
Systems total	24.3	22.5	22.1	21.1	20.1	18.6
Storage						
Disk systems	1.4	1.5	1.5	1.5	1.5	1.4
Tape automation	0.8	0.8	0.7	0.6	0.6	0.6
Storage total	2.2	2.3	2.2	2.1	2.0	2.0
Peripherals						
Printers and MFPs	3.8	3.5	3.2	3.0	2.8	2.7
Smart handheld devices	0.1	0.2	0.2	0.2	0.2	0.2
Other add-ons	5.7	5.5	5.2	5.0	4.8	4.7
Peripherals total	9.7	9.2	8.6	8.2	7.8	7.5
Networking equipment	5.8	5.7	5.5	5.3	5.1	4.9
Hardware total	42.0	39.7	38.3	36.7	35.0	32.9
Packaged software total	20.9	21.8	22.3	23.0	23.8	25.3
Services total	37.1	38.5	39.4	40.3	41.2	41.8
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 417

SOUTH AFRICA PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	35.3	36.6	36.4	35.9	35.9	35.8
Implementation	27.4	28.4	28.2	27.6	27.4	27.0
Maintenance and support	29.1	30.3	30.6	30.4	30.4	30.4
Operations	55.5	57.5	58.3	58.4	58.5	59.1
IT training and education	20.6	22.1	22.6	22.3	22.3	22.0
Services total	31.9	33.1	33.3	32.8	32.7	32.5
Packaged software						
System infrastructure software	31.1	32.5	32.9	33.4	34.4	35.4
Appl. development and deployment	33.1	35.3	36.4	37.9	39.1	40.2
Applications	34.9	35.9	35.6	34.9	34.4	35.9
Packaged software total	33.6	34.9	35.1	35.1	35.4	36.7
Hardware						
Systems						
High-end enterprise servers	61.7	66.6	57.5	42.4	37.1	32.3
Midrange enterprise servers	31.2	32.1	28.8	27.0	26.4	25.0
Volume servers	20.9	19.0	19.2	18.2	17.5	16.4
Servers total	28.3	26.6	24.7	22.2	21.0	19.5
Personal computers	19.3	18.5	18.2	17.6	16.4	15.0
Traditional workstations	12.8	13.3	13.4	13.4	13.6	14.0
Clients total	19.2	18.5	18.2	17.6	16.4	15.0
Systems total	21.2	20.1	19.5	18.5	17.3	15.9
Storage						
Disk systems	21.2	22.9	22.6	21.3	19.9	19.0
Tape automation	39.6	38.7	35.4	33.0	30.5	29.0
Storage total	25.7	26.7	25.5	23.9	22.0	21.0
Peripherals						
Printers and MFPs	17.8	16.8	15.9	15.1	14.4	14.0
Smart handheld devices	13.3	13.6	13.2	12.4	11.9	11.4
Other add-ons	40.7	39.4	35.3	32.2	30.2	28.4
Peripherals total	26.4	25.3	23.6	22.1	21.1	20.3
Networking equipment	20.9	19.9	17.8	16.5	15.3	14.5
Hardware total	22.4	21.4	20.3	19.1	17.9	16.7
Packaged software total	33.6	34.9	35.1	35.1	35.4	36.7
Services total	31.9	33.1	33.3	32.8	32.7	32.5
Total IT	27.3	27.5	27.0	26.3	25.7	25.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 418

SOUTH AFRICA PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.5	0.6	0.7	0.7	0.7	0.8
Implementation	0.5	0.5	0.6	0.6	0.6	0.7
Maintenance and support	0.4	0.4	0.5	0.5	0.5	0.5
Operations	0.5	0.6	0.6	0.6	0.7	0.7
IT training and education	0.2	0.3	0.3	0.4	0.4	0.4
Services total	0.5	0.5	0.5	0.6	0.6	0.6
Packaged software						
System infrastructure software	0.5	0.5	0.6	0.6	0.7	0.7
Appl. development and deployment	0.5	0.5	0.6	0.7	0.7	0.8
Applications	0.6	0.6	0.7	0.7	0.7	0.8
Packaged software total	0.5	0.6	0.6	0.7	0.7	0.7
Hardware						
Systems						
High-end enterprise servers	0.6	0.6	0.5	0.4	0.4	0.3
Midrange enterprise servers	0.6	0.6	0.6	0.6	0.6	0.6
Volume servers	0.7	0.6	0.7	0.7	0.6	0.6
Servers total	0.6	0.6	0.6	0.6	0.6	0.6
Personal computers	0.5	0.5	0.6	0.6	0.6	0.6
Traditional workstations	0.3	0.4	0.6	0.7	0.8	0.8
Clients total	0.5	0.5	0.6	0.6	0.6	0.6
Systems total	0.5	0.5	0.6	0.6	0.6	0.6
Storage						
Disk systems	0.3	0.3	0.4	0.4	0.4	0.4
Tape automation	1.2	1.3	1.2	1.1	1.1	1.1
Storage total	0.4	0.5	0.5	0.5	0.5	0.5
Peripherals						
Printers and MFPs	0.4	0.4	0.4	0.4	0.4	0.4
Smart handheld devices	0.1	0.1	0.1	0.0	0.0	0.0
Other add-ons	1.9	2.2	2.3	2.3	2.4	2.4
Peripherals total	0.7	0.7	0.6	0.6	0.5	0.5
Networking equipment	0.5	0.5	0.5	0.5	0.5	0.5
Hardware total	0.5	0.6	0.6	0.6	0.6	0.5
Packaged software total	0.5	0.6	0.6	0.7	0.7	0.7
Services total	0.5	0.5	0.5	0.6	0.6	0.6
Total IT	0.5	0.5	0.6	0.6	0.6	0.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 419

IT SPENDING IN TURKEY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	36.3	44.6	62.7	86.6	97.1	110.5
Implementation	177.1	214.9	285.2	374.0	421.4	479.3
Maintenance and support	148.0	169.7	202.2	240.8	269.2	306.1
Operations	32.6	38.8	47.3	57.7	59.7	67.8
IT training and education	9.5	11.4	14.8	19.5	21.4	24.3
Services total	403.5	479.5	612.2	778.4	868.8	988.0
Packaged software						
System infrastructure software	55.0	70.3	107.7	138.8	149.3	163.6
Appl. development and deployment	24.1	25.0	42.0	58.0	66.6	75.2
Applications	135.8	144.1	166.8	193.8	203.0	219.6
Packaged software total	214.9	239.3	316.4	390.5	418.9	458.4
Hardware						
Systems						
High-end enterprise servers	1.0	1.1	3.4	4.5	5.6	8.8
Midrange enterprise servers	26.3	21.1	36.5	47.5	51.9	66.2
Volume servers	70.6	72.5	101.1	117.3	141.1	163.6
Servers total	97.9	94.7	141.0	169.3	198.6	238.6
Personal computers	395.1	505.6	626.1	767.1	933.8	1,161.2
Traditional workstations	2.7	3.8	5.1	6.3	7.2	7.3
Clients total	397.8	509.4	631.2	773.4	941.0	1,168.6
Systems total	495.7	604.1	772.2	942.7	1,139.6	1,407.2
Storage						
Disk systems	30.4	39.5	47.4	66.5	85.9	93.8
Tape automation	6.6	6.9	9.4	12.8	15.8	17.9
Storage total	36.9	46.4	56.8	79.3	101.6	111.7
Peripherals						
Printers and MFPs	122.2	137.0	136.7	139.5	139.3	140.9
Smart handheld devices	6.2	7.9	9.3	10.3	11.1	12.1
Other add-ons	51.8	43.4	79.6	113.2	141.4	164.5
Peripherals total	180.3	188.3	225.6	262.9	291.8	317.5
Networking equipment	227.9	252.1	359.7	416.4	486.4	555.9
Hardware total	940.9	1,091.0	1,414.3	1,701.3	2,019.4	2,392.4
Packaged software total	214.9	239.3	316.4	390.5	418.9	458.4
Services total	403.5	479.5	612.2	778.4	868.8	988.0
Total IT	1,559.3	1,809.8	2,342.9	2,870.2	3,307.1	3,838.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 420

GROWTH IN IT SPENDING IN TURKEY, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	22.8	40.4	38.2	12.2	13.7	25.4
Implementation	21.3	32.7	31.1	12.7	13.7	22.2
Maintenance and support	14.7	19.1	19.1	11.8	13.7	15.9
Operations	19.2	21.7	22.0	3.4	13.7	15.0
IT training and education	20.0	30.3	31.1	9.8	13.7	20.9
Services total	18.8	27.7	27.2	11.6	13.7	19.8
Packaged software						
System infrastructure software	27.8	53.3	28.9	7.6	9.6	23.5
Appl. development and deployment	3.9	67.7	38.1	14.9	12.8	31.6
Applications	6.1	15.8	16.2	4.8	8.2	11.1
Packaged software total	11.4	32.2	23.4	7.3	9.4	17.6
Hardware						
Systems						
High-end enterprise servers	14.6	197.0	32.0	23.8	58.4	66.5
Midrange enterprise servers	-19.8	73.1	30.0	9.3	27.5	33.0
Volume servers	2.7	39.5	16.0	20.3	16.0	22.6
Servers total	-3.3	48.9	20.0	17.3	20.2	26.0
Personal computers	28.0	23.8	22.5	21.7	24.4	23.1
Traditional workstations	37.7	34.8	24.5	14.3	1.9	18.2
Clients total	28.0	23.8	22.5	21.7	24.4	23.1
Systems total	21.9	27.8	22.1	20.9	23.5	23.5
Storage						
Disk systems	30.2	19.8	40.3	29.2	9.2	24.1
Tape automation	5.2	36.5	35.4	23.4	13.8	26.9
Storage total	25.7	22.3	39.5	28.2	9.9	24.5
Peripherals						
Printers and MFPs	12.1	-0.2	2.0	-0.1	1.2	0.7
Smart handheld devices	27.1	18.0	10.8	7.8	8.4	11.2
Other add-ons	-16.3	83.4	42.2	24.9	16.4	39.5
Peripherals total	4.4	19.9	16.5	11.0	8.8	14.0
Networking equipment	10.6	42.6	15.8	16.8	14.3	21.9
Hardware total	16.0	29.6	20.3	18.7	18.5	21.7
Packaged software total	11.4	32.2	23.4	7.3	9.4	17.6
Services total	18.8	27.7	27.2	11.6	13.7	19.8
Total IT	16.1	29.5	22.5	15.2	16.1	20.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 421

PROPORTIONS OF IT SPENDING CATEGORIES IN TURKEY, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.3	2.5	2.7	3.0	2.9	2.9
Implementation	11.4	11.9	12.2	13.0	12.7	12.5
Maintenance and support	9.5	9.4	8.6	8.4	8.1	8.0
Operations	2.1	2.1	2.0	2.0	1.8	1.8
IT training and education	0.6	0.6	0.6	0.7	0.6	0.6
Services total	25.9	26.5	26.1	27.1	26.3	25.7
Packaged software						
System infrastructure software	3.5	3.9	4.6	4.8	4.5	4.3
Appl. development and deployment	1.5	1.4	1.8	2.0	2.0	2.0
Applications	8.7	8.0	7.1	6.8	6.1	5.7
Packaged software total	13.8	13.2	13.5	13.6	12.7	11.9
Hardware						
Systems						
High-end enterprise servers	0.1	0.1	0.1	0.2	0.2	0.2
Midrange enterprise servers	1.7	1.2	1.6	1.7	1.6	1.7
Volume servers	4.5	4.0	4.3	4.1	4.3	4.3
Servers total	6.3	5.2	6.0	5.9	6.0	6.2
Personal computers	25.3	27.9	26.7	26.7	28.2	30.3
Traditional workstations	0.2	0.2	0.2	0.2	0.2	0.2
Clients total	25.3	27.9	26.7	26.7	28.2	30.3
Systems total	31.8	33.4	33.0	32.8	34.5	36.7
Storage						
Disk systems	1.9	2.2	2.0	2.3	2.6	2.4
Tape automation	0.4	0.4	0.4	0.4	0.5	0.5
Storage total	2.4	2.6	2.4	2.8	3.1	2.9
Peripherals						
Printers and MFPs	7.8	7.6	5.8	4.9	4.2	3.7
Smart handheld devices	0.4	0.4	0.4	0.4	0.3	0.3
Other add-ons	3.3	2.4	3.4	3.9	4.3	4.3
Peripherals total	11.6	10.4	9.6	9.2	8.8	8.3
Networking equipment	14.6	13.9	15.4	14.5	14.7	14.5
Hardware total	60.3	60.3	60.4	59.3	61.1	62.3
Packaged software total	13.8	13.2	13.5	13.6	12.7	11.9
Services total	25.9	26.5	26.1	27.1	26.3	25.7
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 422

TURKEY PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	6.5	7.4	9.1	11.0	11.1	11.4
Implementation	7.8	8.6	10.1	11.5	11.6	11.7
Maintenance and support	11.5	12.1	12.9	13.7	14.0	14.4
Operations	5.4	5.7	6.1	6.6	6.1	6.3
IT training and education	4.0	4.3	4.8	5.4	5.2	5.3
Services total	8.1	8.8	9.9	11.1	11.1	11.3
Packaged software						
System infrastructure software	8.1	9.3	12.2	13.7	13.1	12.9
Appl. development and deployment	4.4	4.1	6.1	7.3	7.3	7.4
Applications	9.5	9.2	9.6	10.0	9.6	9.1
Packaged software total	8.1	8.2	9.6	10.4	10.1	9.8
Hardware						
Systems						
High-end enterprise servers	0.8	1.2	3.3	4.2	5.2	7.5
Midrange enterprise servers	9.9	8.0	12.2	14.6	15.2	18.0
Volume servers	10.7	10.2	12.1	12.6	13.6	14.4
Servers total	9.3	8.8	11.4	12.5	13.4	14.7
Personal computers	10.4	12.3	13.7	15.0	16.5	18.6
Traditional workstations	4.5	6.7	9.4	12.2	14.8	16.8
Clients total	10.3	12.3	13.6	15.0	16.4	18.5
Systems total	10.1	11.6	13.1	14.5	15.8	17.8
Storage						
Disk systems	11.0	12.9	13.8	17.0	18.8	18.1
Tape automation	7.4	7.1	9.5	11.7	13.6	13.8
Storage total	10.1	11.5	12.8	15.8	17.8	17.3
Peripherals						
Printers and MFPs	13.3	13.9	12.9	12.2	11.4	11.0
Smart handheld devices	13.3	12.9	12.3	11.8	11.0	10.8
Other add-ons	8.7	6.7	10.4	12.8	14.3	14.8
Peripherals total	11.5	11.1	11.9	12.5	12.6	12.7
Networking equipment	19.2	19.0	22.5	22.9	23.6	24.4
Hardware total	11.7	12.6	14.4	15.5	16.6	17.9
Packaged software total	8.1	8.2	9.6	10.4	10.1	9.8
Services total	8.1	8.8	9.9	11.1	11.1	11.3
Total IT	10.0	10.6	12.2	13.2	13.7	14.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 423

TURKEY PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.2	0.2	0.2	0.2
Implementation	0.1	0.2	0.2	0.3	0.3	0.3
Maintenance and support	0.2	0.2	0.2	0.2	0.2	0.2
Operations	0.0	0.1	0.1	0.1	0.1	0.1
IT training and education	0.0	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.2	0.2	0.2	0.2
Packaged software						
System infrastructure software	0.1	0.1	0.2	0.3	0.3	0.3
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.1	0.1	0.2	0.2	0.2	0.2
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.1
Midrange enterprise servers	0.2	0.2	0.3	0.3	0.4	0.4
Volume servers	0.3	0.3	0.4	0.5	0.5	0.6
Servers total	0.2	0.2	0.3	0.3	0.4	0.4
Personal computers	0.3	0.3	0.4	0.5	0.6	0.7
Traditional workstations	0.1	0.2	0.4	0.6	0.8	0.9
Clients total	0.3	0.3	0.4	0.5	0.6	0.7
Systems total	0.2	0.3	0.4	0.5	0.5	0.6
Storage						
Disk systems	0.1	0.2	0.2	0.3	0.4	0.4
Tape automation	0.2	0.2	0.3	0.4	0.5	0.5
Storage total	0.2	0.2	0.2	0.3	0.4	0.4
Peripherals						
Printers and MFPs	0.3	0.3	0.3	0.3	0.3	0.3
Smart handheld devices	0.1	0.1	0.1	0.0	0.0	0.0
Other add-ons	0.4	0.4	0.7	0.9	1.1	1.3
Peripherals total	0.3	0.3	0.3	0.3	0.3	0.3
Networking equipment	0.5	0.5	0.7	0.7	0.8	0.8
Hardware total	0.3	0.3	0.4	0.5	0.5	0.6
Packaged software total	0.1	0.1	0.2	0.2	0.2	0.2
Services total	0.1	0.1	0.2	0.2	0.2	0.2
Total IT	0.2	0.2	0.3	0.3	0.3	0.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 424

IT SPENDING IN THE UNITED ARAB EMIRATES, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Services						
Planning	24.0	25.7	28.0	30.8	34.0	37.7
Implementation	106.3	115.1	128.2	145.5	165.2	183.1
Maintenance and support	46.3	49.4	53.3	58.9	65.0	72.1
Operations	4.3	5.0	5.9	6.9	8.2	9.1
IT training and education	17.5	20.0	23.2	27.2	32.0	35.5
Services total	198.6	215.2	238.6	269.3	304.4	337.5
Packaged software						
System infrastructure software	34.6	36.3	40.2	44.6	50.6	54.8
Appl. development and deployment	28.1	31.9	35.2	39.5	44.1	47.2
Applications	81.4	89.3	102.2	115.9	129.0	141.0
Packaged software total	144.1	157.6	177.7	200.0	223.7	243.0
Hardware						
Systems						
High-end enterprise servers	2.8	3.5	2.1	4.5	4.3	5.6
Midrange enterprise servers	19.3	21.8	22.7	21.0	20.8	20.6
Volume servers	36.6	41.3	47.9	50.2	53.6	56.9
Servers total	58.8	66.6	72.8	75.7	78.6	83.1
Personal computers	271.6	309.4	318.5	326.5	334.0	344.8
Traditional workstations	0.9	0.7	0.6	0.5	0.5	0.4
Clients total	272.5	310.1	319.0	327.0	334.5	345.2
Systems total	331.3	376.7	391.8	402.7	413.2	428.2
Storage						
Disk systems	19.3	20.4	20.8	22.5	22.7	25.2
Tape automation	4.2	4.9	5.1	5.3	5.3	5.8
Storage total	23.5	25.3	25.9	27.8	28.1	31.0
Peripherals						
Printers and MFPs	65.1	68.3	72.4	76.3	82.8	85.8
Smart handheld devices	4.7	6.0	7.1	8.2	8.8	9.3
Other add-ons	27.3	32.4	39.2	44.5	48.1	51.5
Peripherals total	97.0	106.8	118.7	128.9	139.7	146.6
Networking equipment	70.5	83.3	101.8	117.8	133.1	142.5
Hardware total	522.3	592.1	638.2	677.2	713.9	748.3
Packaged software total	144.1	157.6	177.7	200.0	223.7	243.0
Services total	198.6	215.2	238.6	269.3	304.4	337.5
Total IT	865.0	964.8	1,054.5	1,146.5	1,242.1	1,328.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 425

GROWTH IN IT SPENDING IN THE UNITED ARAB EMIRATES, 2003–2007 (%)

	2003	2004	2005	2006	2007	2003–2007 CAGR
Services						
Planning	6.9	9.2	10.0	10.3	10.9	10.1
Implementation	8.3	11.3	13.5	13.5	10.9	12.3
Maintenance and support	6.6	8.0	10.4	10.4	10.9	9.9
Operations	14.9	17.7	18.0	18.4	10.9	16.2
IT training and education	14.4	15.8	17.4	17.5	10.9	15.4
Services total	8.4	10.9	12.9	13.0	10.9	11.9
Packaged software						
System infrastructure software	5.0	10.7	10.8	13.6	8.2	10.8
Appl. development and deployment	13.6	10.4	12.2	11.6	7.1	10.3
Applications	9.7	14.5	13.4	11.3	9.3	12.1
Packaged software total	9.4	12.8	12.6	11.9	8.6	11.4
Hardware						
Systems						
High-end enterprise servers	23.7	-39.7	113.3	-4.9	31.5	12.6
Midrange enterprise servers	12.8	4.3	-7.7	-1.1	-1.1	-1.5
Volume servers	12.9	15.9	4.7	6.8	6.2	8.3
Servers total	13.4	9.2	4.0	3.9	5.6	5.7
Personal computers	13.9	2.9	2.5	2.3	3.2	2.7
Traditional workstations	-22.2	-17.1	-10.3	-7.7	-20.8	-14.2
Clients total	13.9	2.9	2.5	2.3	3.2	2.7
Systems total	13.7	4.0	2.8	2.6	3.7	3.3
Storage						
Disk systems	5.7	1.8	8.3	1.2	10.7	5.4
Tape automation	18.1	4.0	3.5	-0.1	8.6	4.0
Storage total	7.9	2.2	7.3	0.9	10.3	5.1
Peripherals						
Printers and MFPs	5.0	5.9	5.4	8.5	3.6	5.8
Smart handheld devices	29.2	18.5	15.3	7.3	5.8	11.6
Other add-ons	18.7	20.8	13.4	8.2	7.2	12.3
Peripherals total	10.0	11.2	8.6	8.3	5.0	8.2
Networking equipment	18.1	22.2	15.7	13.0	7.1	14.4
Hardware total	13.4	7.8	6.1	5.4	4.8	6.0
Packaged software total	9.4	12.8	12.6	11.9	8.6	11.4
Services total	8.4	10.9	12.9	13.0	10.9	11.9
Total IT	11.5	9.3	8.7	8.3	7.0	8.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 426

PROPORTIONS OF IT SPENDING CATEGORIES IN THE UNITED ARAB EMIRATES, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	2.8	2.7	2.7	2.7	2.7	2.8
Implementation	12.3	11.9	12.2	12.7	13.3	13.8
Maintenance and support	5.4	5.1	5.1	5.1	5.2	5.4
Operations	0.5	0.5	0.6	0.6	0.7	0.7
IT training and education	2.0	2.1	2.2	2.4	2.6	2.7
Services total	23.0	22.3	22.6	23.5	24.5	25.4
Packaged software						
System infrastructure software	4.0	3.8	3.8	3.9	4.1	4.1
Appl. development and deployment	3.2	3.3	3.3	3.4	3.6	3.6
Applications	9.4	9.3	9.7	10.1	10.4	10.6
Packaged software total	16.7	16.3	16.8	17.4	18.0	18.3
Hardware						
Systems						
High-end enterprise servers	0.3	0.4	0.2	0.4	0.3	0.4
Midrange enterprise servers	2.2	2.3	2.2	1.8	1.7	1.5
Volume servers	4.2	4.3	4.5	4.4	4.3	4.3
Servers total	6.8	6.9	6.9	6.6	6.3	6.3
Personal computers	31.4	32.1	30.2	28.5	26.9	25.9
Traditional workstations	0.1	0.1	0.1	0.0	0.0	0.0
Clients total	31.4	32.1	30.2	28.5	26.9	25.9
Systems total	38.3	39.0	37.2	35.1	33.3	32.2
Storage						
Disk systems	2.2	2.1	2.0	2.0	1.8	1.9
Tape automation	0.5	0.5	0.5	0.5	0.4	0.4
Storage total	2.7	2.6	2.5	2.4	2.3	2.3
Peripherals						
Printers and MFPs	7.5	7.1	6.9	6.7	6.7	6.5
Smart handheld devices	0.5	0.6	0.7	0.7	0.7	0.7
Other add-ons	3.2	3.4	3.7	3.9	3.9	3.9
Peripherals total	11.2	11.1	11.3	11.2	11.2	11.0
Networking equipment	8.2	8.6	9.7	10.3	10.7	10.7
Hardware total	60.4	61.4	60.5	59.1	57.5	56.3
Packaged software total	16.7	16.3	16.8	17.4	18.0	18.3
Services total	23.0	22.3	22.6	23.5	24.5	25.4
Total IT	100.0	100.0	100.0	100.0	100.0	100.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 427

UNITED ARAB EMIRATES PROPORTIONS OF THE IT SPENDING IN MIDDLE EAST/AFRICA, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	4.3	4.3	4.1	3.9	3.9	3.9
Implementation	4.7	4.6	4.5	4.5	4.5	4.5
Maintenance and support	3.6	3.5	3.4	3.4	3.4	3.4
Operations	0.7	0.7	0.8	0.8	0.8	0.8
IT training and education	7.4	7.6	7.6	7.6	7.8	7.7
Services total	4.0	4.0	3.9	3.8	3.9	3.9
Packaged software						
System infrastructure software	5.1	4.8	4.6	4.4	4.4	4.3
Appl. development and deployment	5.1	5.3	5.1	5.0	4.9	4.6
Applications	5.7	5.7	5.9	6.0	6.1	5.9
Packaged software total	5.4	5.4	5.4	5.3	5.4	5.2
Hardware						
Systems						
High-end enterprise servers	2.2	3.5	2.0	4.2	4.0	4.8
Midrange enterprise servers	7.2	8.3	7.6	6.5	6.1	5.6
Volume servers	5.6	5.8	5.7	5.4	5.2	5.0
Servers total	5.6	6.2	5.9	5.6	5.3	5.1
Personal computers	7.2	7.6	6.9	6.4	5.9	5.5
Traditional workstations	1.5	1.2	1.1	1.0	1.0	0.9
Clients total	7.1	7.5	6.9	6.3	5.8	5.5
Systems total	6.8	7.2	6.7	6.2	5.7	5.4
Storage						
Disk systems	7.0	6.6	6.0	5.7	5.0	4.9
Tape automation	4.7	5.1	5.1	4.9	4.6	4.4
Storage total	6.4	6.3	5.8	5.6	4.9	4.8
Peripherals						
Printers and MFPs	7.1	6.9	6.9	6.7	6.8	6.7
Smart handheld devices	9.9	9.8	9.4	9.4	8.7	8.4
Other add-ons	4.6	5.0	5.1	5.0	4.9	4.6
Peripherals total	6.2	6.3	6.3	6.1	6.0	5.8
Networking equipment	5.9	6.3	6.4	6.5	6.5	6.3
Hardware total	6.5	6.8	6.5	6.2	5.9	5.6
Packaged software total	5.4	5.4	5.4	5.3	5.4	5.2
Services total	4.0	4.0	3.9	3.8	3.9	3.9
Total IT	5.5	5.7	5.5	5.3	5.1	5.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 428

UNITED ARAB EMIRATES PROPORTIONS OF THE WORLDWIDE IT SPENDING, 2002–2007 (%)

	2002	2003	2004	2005	2006	2007
Services						
Planning	0.1	0.1	0.1	0.1	0.1	0.1
Implementation	0.1	0.1	0.1	0.1	0.1	0.1
Maintenance and support	0.1	0.1	0.1	0.1	0.1	0.1
Operations	0.0	0.0	0.0	0.0	0.0	0.0
IT training and education	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software						
System infrastructure software	0.1	0.1	0.1	0.1	0.1	0.1
Appl. development and deployment	0.1	0.1	0.1	0.1	0.1	0.1
Applications	0.1	0.1	0.1	0.1	0.1	0.1
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Hardware						
Systems						
High-end enterprise servers	0.0	0.0	0.0	0.0	0.0	0.1
Midrange enterprise servers	0.1	0.2	0.2	0.1	0.1	0.1
Volume servers	0.2	0.2	0.2	0.2	0.2	0.2
Servers total	0.1	0.1	0.1	0.1	0.1	0.1
Personal computers	0.2	0.2	0.2	0.2	0.2	0.2
Traditional workstations	0.0	0.0	0.0	0.0	0.1	0.0
Clients total	0.2	0.2	0.2	0.2	0.2	0.2
Systems total	0.2	0.2	0.2	0.2	0.2	0.2
Storage						
Disk systems	0.1	0.1	0.1	0.1	0.1	0.1
Tape automation	0.1	0.2	0.2	0.2	0.2	0.2
Storage total	0.1	0.1	0.1	0.1	0.1	0.1
Peripherals						
Printers and MFPs	0.2	0.2	0.2	0.2	0.2	0.2
Smart handheld devices	0.1	0.1	0.0	0.0	0.0	0.0
Other add-ons	0.2	0.3	0.3	0.4	0.4	0.4
Peripherals total	0.2	0.2	0.2	0.2	0.2	0.1
Networking equipment	0.1	0.2	0.2	0.2	0.2	0.2
Hardware total	0.2	0.2	0.2	0.2	0.2	0.2
Packaged software total	0.1	0.1	0.1	0.1	0.1	0.1
Services total	0.1	0.1	0.1	0.1	0.1	0.1
Total IT	0.1	0.1	0.1	0.1	0.1	0.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

SUMMARY TABLES

Tables 429–456 illustrate the growth forecasts by country for each market segment of services, software, and hardware.

TABLE 429

WORLDWIDE PLANNING SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	359.8	354.3	371.2	393.5	414.7	439.7
China	423.9	521.8	686.9	902.8	1,176.2	1,499.3
Hong Kong	58.8	56.7	57.0	57.5	58.0	58.6
India	128.0	143.7	165.5	187.8	213.4	238.0
Indonesia	19.3	21.4	23.8	27.4	31.6	36.7
Japan	3,950.5	3,931.3	4,048.2	4,174.5	4,319.5	4,495.4
Korea	322.2	352.0	400.3	455.6	514.6	576.7
Malaysia	36.8	39.5	45.4	53.8	65.2	81.5
New Zealand	88.8	95.0	101.2	107.9	114.6	121.3
Philippines	38.1	41.1	43.9	46.9	50.0	53.1
Singapore	100.9	99.2	102.3	106.0	110.3	115.0
Taiwan	186.5	194.9	203.7	209.9	216.4	223.2
Thailand	32.7	38.7	45.5	51.8	58.9	66.2
Vietnam	4.0	5.0	6.0	7.0	8.2	9.5
Rest of Asia/Pacific	27.4	31.5	36.5	42.3	47.9	53.6
AP Excluding Japan	1,827.4	1,994.8	2,289.4	2,650.3	3,080.0	3,572.3
Asia/Pacific total	5,777.9	5,926.1	6,337.6	6,824.8	7,399.6	8,067.7
Central and Eastern Europe						
Bulgaria	4.5	5.1	5.7	6.6	7.5	8.4
Croatia	13.0	15.0	17.8	20.7	23.8	26.6
Czech Republic	90.8	98.9	107.5	118.1	129.5	141.8
Hungary	67.7	71.5	78.7	86.2	95.6	106.7
Poland	82.3	91.8	103.1	115.6	129.4	143.9
Romania	11.4	14.0	15.2	17.6	20.7	26.3
Russia	173.4	203.1	235.9	303.0	368.9	449.2
Slovakia	18.4	21.5	25.0	28.1	30.6	33.4
Slovenia	11.6	12.9	14.1	15.3	16.3	17.8
Rest of Eastern Europe	40.7	47.5	55.2	64.5	73.0	81.2
Central and Eastern Europe total	513.8	581.4	658.2	775.5	895.2	1,035.4
Latin America						
Argentina	54.0	65.9	91.9	120.2	145.2	175.0
Brazil	333.8	300.5	325.5	353.3	381.6	415.0
Chile	37.1	38.5	41.2	44.1	47.3	50.8
Colombia	67.8	76.0	84.9	94.3	103.9	114.3
Mexico	193.6	198.3	215.1	234.2	255.8	277.4
Venezuela	36.9	23.0	25.6	29.6	33.7	38.5
Rest of Latin America	57.2	55.6	56.6	61.0	67.6	71.2
Latin America total	780.5	757.7	840.8	936.7	1,035.1	1,142.2

TABLE 429

WORLDWIDE PLANNING SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	12.4	13.4	16.7	19.0	22.2	24.8
Israel	130.0	127.0	133.5	142.6	150.8	157.4
Saudi Arabia	83.2	88.6	99.3	113.2	129.1	144.8
South Africa	197.2	220.9	250.4	281.9	313.8	347.5
Turkey	36.3	44.6	62.7	86.6	97.1	110.5
United Arab Emirates	24.0	25.7	28.0	30.8	34.0	37.7
Rest of Middle East/Africa	75.0	83.9	98.2	111.6	128.1	148.7
Middle East/Africa total	558.2	604.0	688.7	785.7	875.2	971.4
North America						
Canada	1,082.4	1,045.8	1,067.8	1,104.3	1,149.4	1,201.4
United States	17,741.6	17,507.1	17,928.5	18,670.2	19,645.7	20,648.0
North America total	18,824.1	18,552.9	18,996.3	19,774.5	20,795.2	21,849.4
Western Europe						
Austria	247.2	258.2	276.6	297.3	321.6	342.3
Belgium	268.3	270.0	280.0	296.0	317.4	341.2
Denmark	229.6	226.4	235.6	248.1	261.1	273.6
Finland	168.3	172.1	178.4	189.0	206.8	222.8
France	2,133.1	2,109.6	2,124.6	2,193.6	2,330.9	2,478.0
Germany	2,107.5	2,059.1	2,076.5	2,143.8	2,270.1	2,411.6
Greece	49.0	53.6	59.4	65.1	69.9	74.2
Ireland	61.4	63.7	67.3	72.7	79.1	83.9
Italy	859.2	863.4	873.6	904.3	957.7	1,014.3
Netherlands	522.7	522.9	531.7	558.4	594.2	626.3
Norway	160.9	162.4	167.1	172.6	183.6	200.9
Portugal	68.7	73.3	78.6	86.8	96.2	105.0
Spain	417.1	446.8	480.6	530.4	593.6	655.1
Sweden	393.6	390.5	397.0	415.8	449.8	484.7
Switzerland	411.9	410.8	422.7	445.9	481.1	516.6
United Kingdom	2,462.1	2,462.3	2,471.5	2,557.5	2,715.8	2,873.2
Western Europe total	10,560.5	10,545.2	10,721.3	11,177.1	11,928.9	12,703.8
Worldwide total	37,014.9	36,967.3	38,242.9	40,274.3	42,929.1	45,769.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 430

WORLDWIDE IMPLEMENTATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	1,663.6	1,650.0	1,746.7	1,857.1	1,988.0	2,129.3
China	1,787.9	2,177.9	2,789.4	3,553.6	4,498.3	5,583.6
Hong Kong	243.0	233.8	234.9	236.3	237.7	239.6
India	646.4	724.2	832.7	941.2	1,060.2	1,173.0
Indonesia	68.1	75.1	83.3	95.0	109.0	126.2
Japan	13,427.6	13,408.1	13,889.0	14,399.9	14,990.9	15,684.7
Korea	1,462.1	1,595.9	1,808.5	2,048.0	2,302.8	2,580.4
Malaysia	145.7	154.8	178.2	213.0	260.6	324.5
New Zealand	353.8	378.5	401.9	427.7	454.3	481.6
Philippines	149.0	160.7	172.0	183.4	195.8	208.3
Singapore	400.2	396.6	408.8	423.6	440.9	459.7
Taiwan	444.9	461.6	479.5	493.9	509.3	526.1
Thailand	120.0	139.5	161.4	181.5	203.7	226.1
Vietnam	14.2	17.5	21.0	24.5	28.3	32.5
Rest of Asia/Pacific	98.1	113.0	131.2	152.5	172.3	192.0
AP Excluding Japan	7,596.9	8,279.0	9,449.7	10,831.1	12,461.4	14,282.9
Asia/Pacific total	21,024.5	21,687.1	23,338.6	25,231.0	27,452.3	29,967.6
Central and Eastern Europe						
Bulgaria	31.7	35.8	40.6	45.9	51.8	58.3
Croatia	51.5	60.0	70.6	81.3	92.3	103.5
Czech Republic	385.4	420.5	458.8	506.5	560.2	619.1
Hungary	244.8	261.3	289.9	319.7	354.2	395.5
Poland	375.2	422.6	478.8	538.0	609.4	683.7
Romania	55.0	66.7	71.8	82.4	97.4	123.2
Russia	597.8	706.1	823.7	990.3	1,179.9	1,408.1
Slovakia	94.0	108.3	125.1	141.7	152.7	166.7
Slovenia	43.7	48.1	51.6	56.2	63.2	69.2
Rest of Eastern Europe	173.3	205.2	238.7	278.5	315.3	353.4
Central and Eastern Europe total	2,052.3	2,334.6	2,649.5	3,040.5	3,476.3	3,980.7
Latin America						
Argentina	204.2	248.7	336.0	432.9	530.0	639.9
Brazil	1,319.6	1,181.4	1,272.0	1,374.1	1,478.9	1,600.9
Chile	148.0	156.0	168.3	181.8	197.1	214.1
Colombia	214.7	237.1	262.7	290.1	317.6	346.9
Mexico	783.4	803.8	867.8	943.8	1,028.7	1,113.6
Venezuela	123.7	78.5	87.9	101.3	115.1	130.4
Rest of Latin America	204.8	213.5	216.1	231.5	256.2	268.8
Latin America total	2,998.3	2,919.1	3,210.9	3,555.4	3,923.6	4,314.5

TABLE 430

WORLDWIDE IMPLEMENTATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	68.8	73.7	88.6	106.3	122.3	139.3
Israel	583.2	564.3	585.8	616.1	639.9	668.0
Saudi Arabia	329.2	351.2	390.9	444.2	505.0	566.3
South Africa	624.1	706.1	798.8	896.7	998.6	1,105.7
Turkey	177.1	214.9	285.2	374.0	421.4	479.3
United Arab Emirates	106.3	115.1	128.2	145.5	165.2	183.1
Rest of Middle East/Africa	387.8	462.4	550.4	665.6	795.5	950.6
Middle East/Africa total	2,276.5	2,487.7	2,827.8	3,248.2	3,647.9	4,092.4
North America						
Canada	4,046.8	3,915.2	3,974.4	4,071.5	4,193.5	4,332.2
United States	58,375.4	58,024.1	59,727.6	62,579.9	66,295.4	70,038.3
North America total	62,422.2	61,939.3	63,702.1	66,651.4	70,488.9	74,370.5
Western Europe						
Austria	1,126.2	1,173.0	1,248.4	1,329.2	1,415.1	1,500.7
Belgium	1,105.2	1,118.9	1,155.6	1,215.9	1,292.9	1,384.5
Denmark	1,135.9	1,129.0	1,158.9	1,201.7	1,241.7	1,277.9
Finland	668.3	680.7	699.2	738.6	806.6	875.9
France	8,536.2	8,472.7	8,519.4	8,747.3	9,251.3	9,832.3
Germany	8,220.5	8,051.0	8,057.3	8,238.1	8,662.8	9,169.7
Greece	238.8	263.2	291.5	318.1	341.2	360.7
Ireland	232.8	241.8	254.7	273.9	296.4	315.4
Italy	3,518.2	3,542.4	3,581.4	3,712.4	3,923.7	4,125.6
Netherlands	1,846.5	1,852.0	1,896.8	2,002.7	2,127.0	2,237.1
Norway	664.2	665.2	675.1	693.3	738.5	805.6
Portugal	249.9	267.7	287.1	312.3	342.9	371.7
Spain	1,640.2	1,747.5	1,852.1	2,014.9	2,220.3	2,410.7
Sweden	1,701.1	1,688.4	1,708.5	1,776.0	1,910.0	2,058.4
Switzerland	1,525.5	1,527.4	1,570.6	1,649.6	1,769.6	1,886.7
United Kingdom	10,202.8	10,222.0	10,297.7	10,674.3	11,323.5	12,011.0
Western Europe total	42,612.2	42,643.1	43,254.3	44,898.2	47,663.5	50,623.9
Worldwide total	133,386.0	134,010.9	138,983.2	146,624.8	156,652.5	167,349.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 431

WORLDWIDE MAINTENANCE AND SUPPORT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	828.8	850.5	875.0	914.7	955.4	992.4
China	929.7	1,050.4	1,280.0	1,557.2	1,879.2	2,238.4
Hong Kong	154.4	149.7	150.3	150.8	151.3	152.0
India	326.7	372.1	427.3	487.2	551.9	619.0
Indonesia	47.2	51.8	57.4	64.5	73.6	84.8
Japan	9,090.0	9,018.9	9,093.4	9,303.2	9,693.5	10,166.0
Korea	736.5	790.8	873.4	967.2	1,070.4	1,199.4
Malaysia	113.5	124.3	144.5	173.1	211.5	258.9
New Zealand	156.0	164.6	173.0	180.7	189.7	197.6
Philippines	48.4	52.4	55.9	59.5	62.7	66.1
Singapore	242.2	253.1	260.9	270.3	281.4	293.3
Taiwan	249.6	254.8	261.3	269.1	277.0	286.4
Thailand	72.5	83.0	93.2	103.4	113.7	124.0
Vietnam	9.5	11.4	13.3	15.3	17.8	20.5
Rest of Asia/Pacific	65.4	76.6	90.8	107.5	126.7	148.2
AP Excluding Japan	3,980.3	4,285.4	4,756.2	5,320.6	5,962.4	6,681.2
Asia/Pacific total	13,070.3	13,304.3	13,849.6	14,623.8	15,655.9	16,847.2
Central and Eastern Europe						
Bulgaria	11.1	12.4	13.9	15.7	17.6	19.8
Croatia	32.9	37.8	42.8	48.0	52.3	58.7
Czech Republic	202.3	217.5	235.7	257.5	282.4	311.6
Hungary	132.0	139.4	152.7	167.2	183.0	204.3
Poland	272.2	301.7	336.7	372.2	409.3	450.6
Romania	34.2	39.6	42.2	48.2	58.0	73.4
Russia	219.1	258.5	295.7	353.8	440.0	540.1
Slovakia	52.4	60.6	66.6	74.5	81.9	89.4
Slovenia	23.8	25.6	27.6	30.4	32.7	35.8
Rest of Eastern Europe	90.2	102.8	118.0	139.5	158.2	178.1
Central and Eastern Europe total	1,070.0	1,195.9	1,331.9	1,506.8	1,715.4	1,962.0
Latin America						
Argentina	131.9	148.3	180.5	221.2	266.0	319.5
Brazil	825.1	743.1	806.8	882.8	963.8	1,051.8
Chile	100.5	105.3	112.7	120.9	131.3	143.3
Colombia	141.6	161.6	183.2	206.9	231.0	256.9
Mexico	550.1	575.8	615.6	663.3	714.4	766.6
Venezuela	119.5	79.0	89.7	103.4	117.3	132.5
Rest of Latin America	138.4	144.2	143.5	153.1	169.3	177.4
Latin America total	2,007.1	1,957.3	2,131.9	2,351.6	2,593.0	2,848.1

TABLE 431

WORLDWIDE MAINTENANCE AND SUPPORT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	38.4	40.5	43.2	48.7	54.0	59.5
Israel	269.3	265.3	278.5	298.9	316.7	330.6
Saudi Arabia	194.6	205.8	224.3	247.3	273.1	306.2
South Africa	376.5	425.6	479.6	531.9	583.9	646.6
Turkey	148.0	169.7	202.2	240.8	269.2	306.1
United Arab Emirates	46.3	49.4	53.3	58.9	65.0	72.1
Rest of Middle East/Africa	219.1	247.9	284.1	325.3	358.5	408.0
Middle East/Africa total	1,292.2	1,404.3	1,565.3	1,751.7	1,920.4	2,129.2
North America						
Canada	2,335.7	2,456.3	2,582.4	2,697.3	2,830.4	2,967.8
United States	42,969.3	45,281.6	48,192.7	52,195.4	56,666.1	61,249.4
North America total	45,305.0	47,737.9	50,775.1	54,892.7	59,496.4	64,217.2
Western Europe						
Austria	649.1	684.3	734.1	787.7	840.0	895.6
Belgium	849.6	879.2	917.0	968.6	1,041.0	1,112.0
Denmark	631.4	659.6	687.3	719.0	754.1	787.5
Finland	410.9	425.0	435.3	450.3	477.8	515.7
France	5,927.2	5,946.5	6,006.7	6,208.8	6,535.0	6,904.5
Germany	6,035.7	6,025.5	5,975.9	6,044.9	6,305.0	6,606.4
Greece	154.1	168.4	184.9	202.1	219.2	236.3
Ireland	150.0	154.6	159.5	169.1	182.2	195.4
Italy	2,511.7	2,514.7	2,521.3	2,601.0	2,742.7	2,886.5
Netherlands	1,384.9	1,416.8	1,453.7	1,519.2	1,598.5	1,679.3
Norway	434.7	432.1	429.9	440.1	467.4	497.4
Portugal	171.6	186.0	198.2	212.7	232.4	250.3
Spain	1,062.1	1,132.3	1,197.0	1,290.2	1,419.8	1,543.8
Sweden	1,019.1	1,033.8	1,052.8	1,093.4	1,164.3	1,253.2
Switzerland	1,076.0	1,087.1	1,103.6	1,146.6	1,213.5	1,289.6
United Kingdom	7,195.0	7,281.3	7,375.6	7,685.9	8,151.5	8,636.5
Western Europe total	29,663.1	30,027.0	30,432.9	31,539.5	33,344.6	35,290.1
Worldwide total	92,407.8	95,626.7	100,086.7	106,666.2	114,725.7	123,293.7

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 432

WORLDWIDE OPERATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	2,513.6	2,681.0	2,888.0	3,183.2	3,554.3	4,005.4
China	91.9	134.6	205.1	302.6	435.0	603.4
Hong Kong	126.1	122.9	124.1	125.1	125.9	127.0
India	134.0	160.5	192.2	228.1	263.9	298.0
Indonesia	18.5	20.7	23.8	27.4	32.9	39.9
Japan	6,656.3	6,928.8	7,244.1	7,656.2	8,157.8	8,753.2
Korea	548.6	606.0	698.2	817.6	955.3	1,070.5
Malaysia	53.2	62.1	74.8	93.0	119.5	153.4
New Zealand	201.5	216.0	231.2	246.7	263.4	278.0
Philippines	54.5	59.2	63.6	68.2	72.4	76.9
Singapore	177.7	194.5	200.5	207.8	216.3	225.5
Taiwan	245.8	250.7	257.0	264.7	274.7	287.3
Thailand	24.8	30.0	35.2	40.9	46.1	51.3
Vietnam	3.8	4.7	5.8	6.9	8.2	9.7
Rest of Asia/Pacific	29.0	34.6	42.2	50.2	59.2	68.8
AP Excluding Japan	4,222.9	4,577.6	5,041.6	5,662.2	6,427.2	7,295.1
Asia/Pacific total	10,879.3	11,506.4	12,285.7	13,318.4	14,585.0	16,048.3
Central and Eastern Europe						
Bulgaria	2.8	3.1	3.4	3.8	4.1	4.7
Croatia	1.2	1.6	2.1	2.7	3.4	3.9
Czech Republic	52.3	61.0	72.9	92.1	114.8	143.5
Hungary	47.0	55.3	67.4	80.8	97.2	108.5
Poland	42.8	50.3	59.2	69.6	82.0	97.0
Romania	5.5	6.5	7.2	8.6	10.4	13.1
Russia	84.1	104.8	122.8	158.9	201.2	249.1
Slovakia	4.6	6.4	8.0	11.1	13.6	14.9
Slovenia	4.7	5.5	6.4	7.7	8.7	9.6
Rest of Eastern Europe	19.7	23.4	27.9	33.5	39.4	43.3
Central and Eastern Europe total	264.7	317.9	377.2	468.9	574.9	687.5
Latin America						
Argentina	56.8	68.9	96.0	126.4	159.5	194.2
Brazil	436.5	403.4	455.2	519.1	589.5	665.9
Chile	77.4	81.9	88.0	95.0	103.4	113.5
Colombia	86.7	104.4	121.5	141.0	163.5	188.3
Mexico	266.3	304.0	347.3	399.6	454.3	507.9
Venezuela	141.0	92.6	105.8	121.6	137.5	156.0
Rest of Latin America	84.4	83.6	87.6	97.7	112.3	121.3
Latin America total	1,149.1	1,138.8	1,301.4	1,500.4	1,720.1	1,947.1

TABLE 432

WORLDWIDE OPERATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	2.1	2.5	3.9	4.7	5.4	6.4
Israel	191.9	195.5	210.3	229.5	248.2	259.1
Saudi Arabia	13.6	15.2	17.4	20.4	24.4	27.4
South Africa	336.5	391.7	452.5	513.4	573.9	635.4
Turkey	32.6	38.8	47.3	57.7	59.7	67.8
United Arab Emirates	4.3	5.0	5.9	6.9	8.2	9.1
Rest of Middle East/Africa	24.7	32.3	38.4	47.2	60.5	70.3
Middle East/Africa total	605.9	680.9	775.7	879.7	980.3	1,075.7
North America						
Canada	2,112.5	2,309.6	2,499.8	2,653.0	2,814.0	2,977.8
United States	30,679.3	32,781.5	35,280.2	37,973.6	40,681.5	43,438.0
North America total	32,791.9	35,091.1	37,780.0	40,626.6	43,495.5	46,415.8
Western Europe						
Austria	346.5	379.4	412.4	450.6	489.0	528.6
Belgium	487.5	511.7	538.2	581.0	635.8	681.0
Denmark	454.4	515.7	564.5	607.6	653.6	699.7
Finland	287.5	312.9	334.3	355.4	374.5	406.4
France	3,825.4	3,917.3	4,031.8	4,290.8	4,608.4	4,955.3
Germany	4,129.2	4,270.2	4,431.4	4,690.8	5,068.5	5,389.8
Greece	30.6	33.7	37.7	41.7	46.0	50.8
Ireland	119.9	128.5	136.9	150.3	165.1	180.6
Italy	1,608.5	1,682.9	1,736.9	1,837.1	1,973.6	2,105.5
Netherlands	1,244.4	1,308.7	1,356.8	1,445.8	1,536.3	1,636.6
Norway	292.5	298.2	306.7	322.4	352.2	375.6
Portugal	121.8	137.6	153.3	173.0	197.1	214.2
Spain	718.4	782.9	863.5	973.4	1,108.7	1,227.9
Sweden	713.8	765.1	803.6	851.0	914.5	986.0
Switzerland	724.1	758.0	793.9	840.4	905.2	972.9
United Kingdom	4,808.0	5,038.6	5,254.4	5,553.9	5,983.5	6,388.5
Western Europe total	19,912.4	20,841.5	21,756.2	23,165.4	25,012.3	26,799.5
Worldwide total	65,603.2	69,576.7	74,276.2	79,959.4	86,368.1	92,973.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 433

WORLDWIDE IT TRAINING AND EDUCATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	109.2	116.3	124.5	138.0	149.5	160.9
China	442.4	498.0	651.0	806.0	960.2	1,132.7
Hong Kong	70.3	68.1	68.7	69.0	69.5	70.9
India	52.2	57.0	63.2	69.4	75.3	81.2
Indonesia	18.5	20.8	23.4	26.7	30.6	35.4
Japan	1,645.6	1,618.8	1,625.2	1,674.5	1,736.8	1,821.3
Korea	127.3	139.3	159.0	181.2	205.2	229.9
Malaysia	54.5	62.3	72.5	85.8	103.3	127.6
New Zealand	59.5	63.5	66.3	69.3	72.3	75.3
Philippines	28.8	32.4	36.0	40.4	44.9	49.3
Singapore	157.8	161.9	166.9	172.9	180.0	187.6
Taiwan	159.2	164.3	171.0	179.2	187.7	196.7
Thailand	39.3	46.9	57.2	69.7	85.8	105.5
Vietnam	4.3	5.8	7.3	8.6	9.7	10.9
Rest of Asia/Pacific	30.2	34.1	39.2	46.6	53.3	60.8
AP Excluding Japan	1,353.5	1,470.7	1,706.1	1,962.8	2,227.2	2,524.6
Asia/Pacific total	2,999.1	3,089.5	3,331.4	3,637.4	3,964.0	4,345.9
Central and Eastern Europe						
Bulgaria	1.2	1.3	1.5	1.7	1.9	2.1
Croatia	8.2	9.5	10.6	11.6	12.6	14.1
Czech Republic	37.1	42.0	47.5	54.6	62.8	72.2
Hungary	37.6	39.5	43.3	47.1	52.0	58.0
Poland	47.3	53.3	60.0	68.0	76.6	86.1
Romania	5.1	6.2	6.8	7.8	9.3	11.8
Russia	99.8	119.2	138.2	165.5	210.7	251.7
Slovakia	6.3	7.1	8.1	9.0	9.9	10.8
Slovenia	7.4	7.7	7.6	8.0	8.0	8.8
Rest of Eastern Europe	17.1	19.9	23.1	27.2	31.0	34.3
Central and Eastern Europe total	267.1	305.7	346.8	400.5	474.8	549.9
Latin America						
Argentina	13.9	16.8	22.9	30.1	38.1	45.7
Brazil	147.5	132.3	141.1	153.8	165.0	181.1
Chile	21.7	22.1	23.7	24.8	26.3	27.9
Colombia	21.7	24.8	27.8	30.6	33.6	36.7
Mexico	83.2	83.3	87.5	92.6	98.2	103.1
Venezuela	16.3	10.7	11.5	13.1	14.7	16.4
Rest of Latin America	19.3	21.2	22.7	24.0	26.3	27.3
Latin America total	323.7	311.3	337.2	368.9	402.1	438.1

TABLE 433

WORLDWIDE IT TRAINING AND EDUCATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	3.5	3.6	4.9	6.3	9.2	11.9
Israel	65.9	63.9	65.8	71.5	77.2	80.6
Saudi Arabia	40.0	44.6	51.6	59.6	68.9	77.3
South Africa	48.9	58.0	69.2	79.8	90.9	100.6
Turkey	9.5	11.4	14.8	19.5	21.4	24.3
United Arab Emirates	17.5	20.0	23.2	27.2	32.0	35.5
Rest of Middle East/Africa	52.3	61.2	76.9	93.4	108.6	127.6
Middle East/Africa total	237.6	262.9	306.4	357.3	408.2	457.8
North America						
Canada	573.5	562.7	578.9	605.4	634.9	663.1
United States	9,617.7	9,305.0	9,257.2	9,397.0	9,978.1	10,683.9
North America total	10,191.2	9,867.7	9,836.1	10,002.3	10,612.9	11,347.0
Western Europe						
Austria	141.1	150.6	161.5	173.1	185.5	197.9
Belgium	319.6	316.7	327.9	345.1	370.0	382.0
Denmark	240.5	240.1	245.4	252.3	260.0	267.7
Finland	149.1	152.5	154.8	161.2	173.3	177.8
France	1,329.9	1,287.7	1,262.5	1,275.4	1,320.8	1,373.2
Germany	1,715.7	1,666.3	1,615.0	1,588.6	1,615.8	1,650.0
Greece	22.6	24.9	27.7	30.6	33.5	36.4
Ireland	51.9	54.4	56.3	60.9	65.1	68.4
Italy	629.5	620.2	622.8	629.0	660.1	666.7
Netherlands	499.7	495.8	497.9	507.8	532.2	560.7
Norway	141.9	137.4	140.9	145.9	158.9	160.2
Portugal	46.0	47.7	49.1	51.3	53.9	56.7
Spain	312.1	329.5	347.1	365.5	392.1	419.9
Sweden	312.4	305.3	301.7	304.5	318.3	322.8
Switzerland	287.9	284.6	287.9	296.4	316.9	338.0
United Kingdom	1,453.1	1,450.1	1,448.3	1,490.9	1,567.9	1,606.5
Western Europe total	7,653.0	7,563.8	7,546.8	7,678.3	8,024.2	8,285.1
Worldwide total	21,671.7	21,400.9	21,704.6	22,444.8	23,886.2	25,423.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 434

WORLDWIDE SYSTEM INFRASTRUCTURE SOFTWARE SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	708.1	698.5	715.2	762.1	814.4	867.8
China	700.3	807.5	955.4	1,151.0	1,380.6	1,636.3
Hong Kong	122.2	120.7	128.2	137.1	149.0	163.2
India	136.0	150.7	181.4	220.2	274.8	346.6
Indonesia	38.0	38.3	45.5	51.1	57.2	62.9
Japan	5,799.7	6,145.0	6,660.2	7,166.7	7,706.3	8,207.8
Korea	519.3	571.9	639.5	717.3	795.2	876.0
Malaysia	99.5	105.2	110.3	119.6	131.7	145.5
New Zealand	108.9	96.1	99.5	106.9	114.2	123.1
Philippines	31.1	36.2	39.7	43.2	47.1	51.6
Singapore	146.9	150.4	162.2	175.6	191.0	208.5
Taiwan	197.5	205.2	221.3	239.6	260.4	284.3
Thailand	56.5	59.2	64.8	70.8	77.9	84.0
Vietnam	6.0	6.8	7.9	9.2	10.6	12.4
Rest of Asia/Pacific	27.1	28.9	31.4	35.0	39.2	44.3
AP Excluding Japan	2,897.3	3,075.6	3,402.2	3,838.7	4,343.4	4,906.6
Asia/Pacific total	8,697.0	9,220.6	10,062.4	11,005.4	12,049.7	13,114.4
Central and Eastern Europe						
Bulgaria	9.6	10.7	11.9	13.4	15.0	16.3
Croatia	23.7	26.1	28.7	31.6	34.8	39.3
Czech Republic	134.1	151.3	169.8	190.7	213.0	234.2
Hungary	101.3	112.3	123.2	134.2	145.2	157.2
Poland	173.5	198.8	227.1	259.1	294.8	315.4
Romania	15.9	17.8	20.0	22.3	24.8	27.1
Russia	106.1	127.1	146.2	162.3	175.2	189.3
Slovakia	29.2	32.3	35.4	38.7	42.6	46.9
Slovenia	20.1	22.3	24.5	27.0	29.7	32.3
Rest of Eastern Europe	64.2	73.2	83.3	96.2	103.4	114.3
Central and Eastern Europe total	677.8	772.0	870.1	975.5	1,078.5	1,172.5
Latin America						
Argentina	56.6	72.4	95.7	118.4	140.8	148.4
Brazil	666.1	712.4	763.7	814.1	864.2	913.9
Chile	27.0	28.3	30.3	33.1	35.8	37.6
Colombia	29.0	30.7	33.3	37.0	40.9	43.4
Mexico	240.4	249.3	261.6	269.0	280.9	301.9
Venezuela	30.7	22.0	26.8	35.5	44.2	49.3
Rest of Latin America	63.8	66.8	72.2	79.9	88.4	96.4
Latin America total	1,113.5	1,182.0	1,283.7	1,386.9	1,495.2	1,590.9

TABLE 434

WORLDWIDE SYSTEM INFRASTRUCTURE SOFTWARE SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	20.1	21.2	23.7	26.1	34.3	37.3
Israel	168.6	172.8	180.6	192.0	206.4	220.0
Saudi Arabia	89.4	98.6	108.7	119.3	130.5	141.3
South Africa	212.4	246.8	289.4	338.1	391.8	447.9
Turkey	55.0	70.3	107.7	138.8	149.3	163.6
United Arab Emirates	34.6	36.3	40.2	44.6	50.6	54.8
Rest of Middle East/Africa	102.3	112.4	128.6	152.5	176.2	201.0
Middle East/Africa total	682.3	758.4	879.0	1,011.4	1,139.2	1,265.8
North America						
Canada	914.9	909.1	926.7	954.5	984.8	1,019.8
United States	18,793.7	19,267.3	20,092.7	21,466.6	23,279.1	25,207.3
North America total	19,708.6	20,176.4	21,019.4	22,421.1	24,263.9	26,227.1
Western Europe						
Austria	328.7	336.7	355.9	382.0	412.5	443.3
Belgium	494.1	517.6	544.0	580.4	620.0	663.8
Denmark	301.4	314.2	335.4	359.1	386.1	411.4
Finland	213.6	221.3	237.7	252.4	273.7	294.2
France	2,713.4	2,779.9	2,906.1	3,104.2	3,321.5	3,554.6
Germany	3,350.0	3,617.0	3,883.6	4,186.2	4,478.6	4,812.8
Greece	73.7	77.9	82.6	90.0	96.7	104.3
Ireland	104.3	107.6	115.1	120.1	130.2	140.5
Italy	1,022.6	1,070.2	1,143.5	1,224.2	1,332.9	1,449.5
Netherlands	962.7	982.5	1,047.3	1,129.2	1,229.9	1,332.5
Norway	214.9	222.1	237.6	257.6	278.9	299.7
Portugal	101.0	108.2	116.8	127.5	138.2	149.6
Spain	557.8	584.6	622.4	664.8	717.8	771.4
Sweden	457.2	473.2	506.6	540.2	582.0	621.0
Switzerland	582.7	621.7	662.4	703.8	745.8	801.4
United Kingdom	3,248.6	3,483.1	3,765.0	4,034.5	4,275.4	4,634.5
Western Europe total	14,726.7	15,517.5	16,562.1	17,756.3	19,020.1	20,484.5
Worldwide total	45,606.0	47,626.9	50,676.6	54,556.7	59,046.6	63,855.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 435

WORLDWIDE APPLICATION DEVELOPMENT AND DEPLOYMENT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	585.0	563.9	606.3	652.1	707.5	765.5
China	418.3	531.3	684.2	881.8	1,116.0	1,384.6
Hong Kong	103.5	104.0	107.6	113.7	122.2	130.4
India	90.2	97.0	112.6	129.1	152.5	176.2
Indonesia	18.6	18.3	19.4	20.5	22.3	24.0
Japan	3,177.6	3,204.2	3,314.8	3,515.8	3,768.9	4,034.2
Korea	397.7	384.4	401.1	434.8	484.2	529.7
Malaysia	73.1	74.2	77.7	82.3	88.6	96.6
New Zealand	81.2	68.1	70.6	74.3	79.6	85.0
Philippines	24.4	25.9	26.8	28.6	30.9	33.6
Singapore	135.6	135.5	143.1	153.0	167.8	185.2
Taiwan	156.5	161.3	169.8	184.0	203.0	222.1
Thailand	39.1	39.9	42.3	45.2	49.3	54.0
Vietnam	4.9	4.9	5.1	5.3	5.5	5.6
Rest of Asia/Pacific	10.0	10.0	10.2	10.5	10.8	11.0
AP Excluding Japan	2,138.1	2,218.9	2,476.7	2,815.1	3,240.3	3,703.4
Asia/Pacific total	5,315.6	5,423.1	5,791.4	6,330.9	7,009.1	7,737.6
Central and Eastern Europe						
Bulgaria	4.6	5.3	6.0	6.8	7.7	8.5
Croatia	18.4	20.5	22.6	25.1	27.8	31.1
Czech Republic	80.5	91.6	104.2	118.1	132.4	146.4
Hungary	83.6	92.4	101.3	110.9	124.2	135.2
Poland	112.6	127.7	144.5	163.3	184.2	206.4
Romania	15.4	17.3	18.8	20.1	22.6	26.0
Russia	136.4	166.3	194.6	220.1	241.9	265.3
Slovakia	23.0	25.6	28.6	32.0	35.6	38.8
Slovenia	16.4	18.3	20.3	22.5	24.9	26.5
Rest of Eastern Europe	52.7	59.4	66.5	74.9	81.8	91.7
Central and Eastern Europe total	543.6	624.4	707.5	793.8	883.1	976.1
Latin America						
Argentina	51.4	68.4	93.1	116.4	138.5	149.3
Brazil	561.2	599.2	643.0	688.6	735.7	786.1
Chile	32.5	35.0	37.5	39.6	41.6	44.2
Colombia	55.3	57.5	61.8	68.1	74.9	78.2
Mexico	190.6	198.4	208.4	218.4	227.4	244.4
Venezuela	57.7	42.1	50.0	65.0	79.7	89.4
Rest of Latin America	123.3	127.9	140.7	156.0	173.4	181.5
Latin America total	1,072.0	1,128.6	1,234.5	1,352.0	1,471.2	1,573.1

TABLE 435

WORLDWIDE APPLICATION DEVELOPMENT AND DEPLOYMENT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	18.3	18.2	20.1	22.9	26.8	30.1
Israel	137.1	138.1	143.4	151.4	161.6	171.3
Saudi Arabia	69.3	78.8	88.5	97.6	108.3	119.4
South Africa	181.9	213.2	252.2	302.1	354.7	408.9
Turkey	24.1	25.0	42.0	58.0	66.6	75.2
United Arab Emirates	28.1	31.9	35.2	39.5	44.1	47.2
Rest of Middle East/Africa	90.1	99.3	110.7	125.9	145.1	164.4
Middle East/Africa total	549.0	604.6	692.1	797.4	907.2	1,016.6
North America						
Canada	1,052.1	1,064.9	1,087.5	1,117.5	1,145.1	1,172.4
United States	18,689.6	19,143.5	19,962.1	21,333.2	23,142.6	25,058.5
North America total	19,741.8	20,208.4	21,049.6	22,450.8	24,287.8	26,230.9
Western Europe						
Austria	269.7	274.2	286.2	302.0	323.8	349.7
Belgium	365.5	374.5	391.4	419.2	453.4	491.6
Denmark	295.9	308.3	324.9	346.0	370.9	401.9
Finland	233.1	238.3	245.4	263.4	282.6	307.5
France	1,886.1	1,939.5	2,048.8	2,204.4	2,369.3	2,567.9
Germany	2,584.6	2,668.4	2,817.9	2,999.3	3,278.9	3,571.7
Greece	69.1	70.6	73.7	79.5	85.6	94.2
Ireland	91.6	92.3	95.2	99.9	107.2	115.7
Italy	988.2	1,010.2	1,044.2	1,107.6	1,187.9	1,278.0
Netherlands	956.7	973.9	1,004.4	1,072.4	1,145.6	1,237.5
Norway	216.1	221.0	237.1	257.7	280.2	305.0
Portugal	95.6	96.9	101.3	109.7	118.0	127.5
Spain	434.5	446.9	467.8	502.9	539.2	587.2
Sweden	490.3	507.9	540.8	580.3	625.4	678.8
Switzerland	440.5	445.9	469.5	504.3	546.0	594.8
United Kingdom	2,501.6	2,571.2	2,709.7	2,890.6	3,167.2	3,424.2
Western Europe total	11,919.0	12,240.0	12,858.4	13,739.2	14,881.2	16,133.4
Worldwide total	39,141.0	40,229.0	42,333.6	45,464.1	49,439.5	53,667.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 436

WORLDWIDE APPLICATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	1,002.6	944.2	992.6	1,063.3	1,153.4	1,246.3
China	965.8	1,224.5	1,602.0	2,071.9	2,618.5	3,274.1
Hong Kong	97.8	93.1	97.0	102.9	110.9	121.5
India	230.5	281.7	343.1	417.4	511.0	608.6
Indonesia	43.9	45.2	47.9	52.0	56.9	60.9
Japan	5,538.6	5,628.6	5,767.8	5,953.4	6,192.7	6,465.0
Korea	756.2	763.6	818.1	918.3	1,016.4	1,138.7
Malaysia	189.9	201.5	216.8	231.2	248.2	264.1
New Zealand	96.7	78.3	82.1	86.1	91.1	97.4
Philippines	47.1	52.7	57.3	64.0	70.4	77.1
Singapore	206.0	189.6	203.6	217.5	235.1	257.1
Taiwan	209.0	196.0	203.6	209.6	218.6	228.8
Thailand	55.4	60.6	67.5	75.8	85.5	96.1
Vietnam	2.3	2.4	2.6	2.7	3.0	3.3
Rest of Asia/Pacific	4.5	4.7	4.8	5.0	5.3	5.6
AP Excluding Japan	3,907.7	4,138.0	4,738.9	5,517.6	6,424.2	7,479.7
Asia/Pacific total	9,446.3	9,766.6	10,506.7	11,471.0	12,616.9	13,944.7
Central and Eastern Europe						
Bulgaria	22.8	27.3	31.5	36.2	41.3	45.2
Croatia	45.3	52.5	59.4	66.6	74.4	83.4
Czech Republic	203.5	233.8	268.1	305.6	346.7	376.4
Hungary	183.9	210.2	234.8	262.7	289.4	323.4
Poland	301.0	345.6	394.6	448.7	508.4	562.0
Romania	34.3	39.8	43.2	49.3	57.4	65.9
Russia	363.6	445.6	524.2	595.6	657.9	719.3
Slovakia	61.5	69.6	77.3	85.5	95.6	105.6
Slovenia	45.0	52.0	59.9	66.0	75.3	82.3
Rest of Eastern Europe	169.3	198.7	229.2	260.7	291.0	326.2
Central and Eastern Europe total	1,430.1	1,675.1	1,922.2	2,176.9	2,437.4	2,689.9
Latin America						
Argentina	64.9	82.7	112.4	131.3	155.5	161.3
Brazil	502.8	535.3	580.9	630.4	682.1	734.6
Chile	68.2	71.2	76.6	83.3	89.6	93.2
Colombia	97.8	106.4	117.7	132.2	143.4	151.2
Mexico	250.5	256.3	265.3	284.3	293.5	314.2
Venezuela	63.2	42.7	53.7	76.6	91.5	99.7
Rest of Latin America	42.5	44.6	48.3	53.3	58.3	64.4
Latin America total	1,089.9	1,139.2	1,254.9	1,391.3	1,513.9	1,618.6

TABLE 436

WORLDWIDE APPLICATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	58.8	62.7	71.4	82.6	94.4	108.2
Israel	272.3	272.1	279.0	290.6	305.0	318.3
Saudi Arabia	171.1	188.1	208.3	231.3	258.4	284.3
South Africa	500.2	558.7	615.7	674.2	729.5	861.6
Turkey	135.8	144.1	166.8	193.8	203.0	219.6
United Arab Emirates	81.4	89.3	102.2	115.9	129.0	141.0
Rest of Middle East/Africa	214.5	243.4	287.1	343.3	398.3	467.4
Middle East/Africa total	1,434.1	1,558.4	1,730.5	1,931.6	2,117.7	2,400.4
North America						
Canada	1,860.5	1,892.4	1,939.7	2,008.1	2,075.9	2,136.8
United States	44,313.5	45,353.8	47,459.7	50,563.0	54,008.8	56,647.6
North America total	46,174.0	47,246.1	49,399.4	52,571.1	56,084.7	58,784.4
Western Europe						
Austria	570.6	580.9	604.7	641.6	688.1	735.4
Belgium	817.3	832.1	871.1	924.0	993.1	1,061.3
Denmark	579.3	588.0	617.6	659.7	702.9	746.3
Finland	390.0	406.6	433.2	462.8	495.3	527.2
France	4,296.3	4,415.2	4,630.0	4,944.3	5,304.0	5,665.2
Germany	6,119.4	6,154.3	6,471.0	6,884.3	7,381.5	7,857.3
Greece	126.1	129.2	136.3	148.3	160.3	171.3
Ireland	186.4	188.1	197.4	209.2	223.9	238.8
Italy	1,964.8	2,010.6	2,084.3	2,230.7	2,402.1	2,556.9
Netherlands	1,869.4	1,924.0	2,021.1	2,142.9	2,293.7	2,441.6
Norway	390.7	402.2	430.5	463.7	499.4	531.6
Portugal	183.7	186.4	195.4	213.4	231.4	246.4
Spain	948.6	971.4	1,020.6	1,098.2	1,177.8	1,253.8
Sweden	921.1	951.7	1,006.4	1,072.8	1,142.7	1,215.4
Switzerland	1,050.2	1,040.4	1,083.6	1,157.4	1,229.2	1,308.4
United Kingdom	6,073.2	6,145.5	6,250.5	6,634.8	7,112.5	7,581.4
Western Europe total	26,486.9	26,926.5	28,053.6	29,888.1	32,037.9	34,138.3
Worldwide total	86,061.3	88,311.9	92,867.3	99,430.0	106,808.4	113,576.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 437

WORLDWIDE HIGH-END ENTERPRISE SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	126.0	100.9	92.6	90.5	97.1	102.0
China	270.4	239.9	212.4	192.5	195.8	195.8
Hong Kong	40.1	35.0	32.1	30.2	31.1	33.4
India	30.0	35.9	36.7	36.7	38.4	44.2
Indonesia	35.0	37.4	34.6	36.0	36.9	35.8
Japan	2,956.0	3,094.1	2,895.6	2,677.5	2,557.3	2,224.6
Korea	360.9	335.3	338.5	328.9	327.4	347.3
Malaysia	25.5	24.6	25.2	25.6	28.2	27.0
New Zealand	7.2	3.9	3.2	3.3	3.4	4.9
Philippines	12.6	11.7	10.8	9.6	9.8	12.0
Singapore	59.4	50.0	50.0	50.5	48.4	48.4
Taiwan	79.4	68.7	67.8	66.2	66.0	67.9
Thailand	37.0	32.0	30.0	31.1	32.6	32.6
Vietnam	-	-	-	-	-	-
Rest of Asia/Pacific	38.0	33.2	35.2	38.1	39.6	40.4
AP Excluding Japan	1,121.4	1,008.4	969.0	939.3	954.9	991.8
Asia/Pacific total	4,077.4	4,102.5	3,864.7	3,616.8	3,512.2	3,216.4
Central and Eastern Europe						
Bulgaria	-	1.1	-	1.3	-	-
Croatia	2.1	1.2	2.5	3.6	2.4	3.6
Czech Republic	13.3	6.6	5.2	2.6	3.8	6.3
Hungary	3.5	2.3	4.6	3.4	1.1	2.2
Poland	47.5	9.0	7.2	9.9	17.6	27.8
Romania	1.3	1.4	-	1.3	1.2	-
Russia	31.3	27.7	29.1	35.2	41.2	53.3
Slovakia	-	-	1.2	-	1.2	2.3
Slovenia	-	-	2.8	-	2.6	-
Rest of Eastern Europe	1.0	2.2	2.5	4.7	2.4	4.3
Central and Eastern Europe total	100.1	51.7	55.0	62.1	73.5	99.8
Latin America						
Argentina	7.3	12.7	16.7	14.1	14.6	14.7
Brazil	279.3	206.9	210.8	220.1	228.7	237.9
Chile	14.0	8.6	7.3	6.1	6.0	6.1
Colombia	10.4	7.3	5.4	5.7	5.8	6.0
Mexico	74.7	81.3	84.5	88.4	88.5	89.8
Venezuela	23.3	10.7	10.9	14.8	15.9	17.3
Rest of Latin America	29.8	27.6	28.9	29.4	29.5	30.0
Latin America total	438.8	355.1	364.4	378.6	389.0	401.7

TABLE 437

WORLDWIDE HIGH-END ENTERPRISE SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	1.6	3.1	4.3	2.7	1.8	3.5
Israel	22.6	11.7	18.1	19.3	21.7	25.4
Saudi Arabia	16.4	12.6	9.2	17.4	14.4	14.6
South Africa	77.2	66.2	59.3	44.8	39.8	37.9
Turkey	1.0	1.1	3.4	4.5	5.6	8.8
United Arab Emirates	2.8	3.5	2.1	4.5	4.3	5.6
Rest of Middle East/Africa	3.5	1.1	6.6	12.6	19.5	21.5
Middle East/Africa total	125.2	99.3	103.0	105.7	107.1	117.1
North America						
Canada	320.8	284.7	291.4	283.1	261.6	242.7
United States	4,351.2	3,510.3	3,401.2	3,550.9	3,790.7	3,879.2
North America total	4,672.0	3,795.0	3,692.6	3,834.0	4,052.3	4,121.8
Western Europe						
Austria	78.8	56.0	55.9	50.1	47.1	45.7
Belgium	90.2	74.9	75.8	70.5	66.2	67.2
Denmark	52.0	49.2	54.2	50.6	48.0	48.1
Finland	25.6	20.1	24.3	21.9	24.8	26.1
France	698.3	543.8	537.6	502.3	481.1	469.5
Germany	1,329.8	1,095.1	1,067.6	1,051.8	979.6	924.0
Greece	6.7	9.7	9.4	9.0	9.0	9.8
Ireland	12.4	10.1	11.9	10.8	11.1	11.1
Italy	425.0	515.0	499.8	459.5	418.6	412.0
Netherlands	118.8	107.9	113.3	106.7	105.7	108.1
Norway	24.7	19.4	23.9	22.7	22.2	23.0
Portugal	19.1	11.6	14.4	11.7	10.6	10.3
Spain	166.4	177.2	183.4	172.1	163.4	164.0
Sweden	51.5	31.8	40.2	37.8	38.0	39.4
Switzerland	137.6	120.7	132.8	121.6	115.4	114.4
United Kingdom	712.2	564.8	551.9	530.9	521.5	516.7
Western Europe total	3,949.0	3,407.3	3,396.5	3,230.3	3,062.4	2,989.4
Worldwide total	13,362.5	11,811.0	11,476.3	11,227.4	11,196.4	10,946.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 438

WORLDWIDE MIDRANGE ENTERPRISE SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	175.3	182.9	216.0	239.9	246.6	251.1
China	588.6	624.0	701.8	769.5	791.8	825.7
Hong Kong	88.1	88.6	100.5	108.5	106.3	102.4
India	115.3	124.9	146.6	162.2	178.3	193.3
Indonesia	25.9	25.9	32.9	36.5	41.2	46.8
Japan	2,525.6	1,801.8	1,860.0	1,722.9	1,615.2	1,725.7
Korea	591.1	580.6	645.1	695.7	723.5	733.9
Malaysia	62.9	59.8	61.2	64.7	68.3	75.5
New Zealand	22.8	20.4	22.2	23.1	23.6	22.8
Philippines	24.8	28.0	32.5	37.6	41.7	44.0
Singapore	109.1	96.9	103.8	113.8	123.7	132.4
Taiwan	134.0	136.9	150.5	162.1	164.9	167.9
Thailand	49.9	58.2	65.4	71.3	75.5	80.6
Vietnam	2.0	1.8	2.0	2.2	2.4	2.6
Rest of Asia/Pacific	31.7	31.3	37.0	43.6	47.2	51.3
AP Excluding Japan	2,021.9	2,060.1	2,317.5	2,530.7	2,635.0	2,730.4
Asia/Pacific total	4,547.4	3,861.9	4,177.5	4,253.6	4,250.2	4,456.1
Central and Eastern Europe						
Bulgaria	3.3	4.5	5.4	5.2	6.1	5.6
Croatia	16.7	15.7	15.7	19.3	20.9	20.4
Czech Republic	55.2	56.9	56.2	57.2	59.8	60.9
Hungary	34.4	36.0	37.5	37.8	37.0	38.1
Poland	63.9	72.8	75.9	78.7	80.9	83.0
Romania	4.8	7.1	5.9	7.9	9.4	10.3
Russia	44.1	44.2	50.9	58.5	67.6	77.6
Slovakia	19.1	24.2	22.7	28.1	29.9	29.1
Slovenia	14.2	14.2	10.7	12.0	12.8	14.7
Rest of Eastern Europe	22.0	25.0	25.3	29.2	33.5	35.8
Central and Eastern Europe total	277.7	300.6	306.1	333.8	357.9	375.5
Latin America						
Argentina	12.6	24.6	30.4	33.8	34.6	34.0
Brazil	138.5	110.2	113.7	115.7	118.8	121.1
Chile	16.8	16.9	17.6	18.0	18.4	18.7
Colombia	15.8	16.3	17.6	19.0	20.4	21.8
Mexico	109.7	96.5	101.7	106.6	112.7	117.7
Venezuela	20.7	11.9	13.8	19.3	21.0	22.0
Rest of Latin America	52.4	48.7	50.9	53.3	56.4	59.3
Latin America total	366.4	325.0	345.7	365.6	382.4	394.6

TABLE 438

WORLDWIDE MIDRANGE ENTERPRISE SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	9.0	8.8	9.9	11.0	10.7	11.1
Israel	61.2	60.9	60.2	62.9	65.4	67.6
Saudi Arabia	34.9	34.3	37.7	42.8	43.7	44.5
South Africa	83.3	84.4	86.3	87.5	89.8	92.0
Turkey	26.3	21.1	36.5	47.5	51.9	66.2
United Arab Emirates	19.3	21.8	22.7	21.0	20.8	20.6
Rest of Middle East/Africa	33.2	31.9	45.9	51.7	58.3	65.4
Middle East/Africa total	267.2	263.2	299.3	324.4	340.7	367.3
North America						
Canada	405.0	432.8	463.6	486.1	500.5	500.1
United States	4,813.1	4,861.9	4,974.7	5,110.0	5,137.1	5,575.3
North America total	5,218.2	5,294.7	5,438.4	5,596.1	5,637.7	6,075.4
Western Europe						
Austria	99.0	84.6	85.8	95.0	95.8	100.1
Belgium	167.2	115.9	113.3	118.8	114.0	112.7
Denmark	71.7	68.1	73.3	88.3	100.9	114.2
Finland	118.8	83.8	81.4	85.4	84.0	86.5
France	642.3	531.5	546.3	593.2	578.0	584.5
Germany	904.6	770.9	788.6	870.7	811.0	812.0
Greece	24.6	18.5	20.8	23.1	23.1	24.6
Ireland	50.3	32.3	30.4	30.7	27.6	27.0
Italy	433.2	368.2	397.1	450.7	520.8	586.8
Netherlands	192.0	165.9	168.0	182.3	178.6	185.3
Norway	69.9	47.9	47.5	49.0	46.9	46.2
Portugal	42.2	28.4	25.1	26.7	25.0	24.1
Spain	202.0	204.5	194.1	210.4	232.7	259.4
Sweden	120.7	104.6	102.9	111.5	112.8	116.9
Switzerland	198.0	188.0	181.7	197.0	207.9	226.7
United Kingdom	754.8	595.8	599.4	659.5	649.3	666.9
Western Europe total	4,091.2	3,408.9	3,455.6	3,792.4	3,808.4	3,973.8
Worldwide total	14,768.1	13,454.2	14,022.5	14,665.9	14,777.3	15,642.8

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 439

WORLDWIDE VOLUME SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	460.5	446.9	465.0	473.5	491.9	517.5
China	995.2	1,128.8	1,376.1	1,650.1	1,939.2	2,290.2
Hong Kong	122.0	117.5	123.0	129.9	145.4	162.7
India	147.6	169.2	171.9	188.4	224.7	264.6
Indonesia	63.5	72.2	78.9	91.0	106.5	126.3
Japan	1,965.5	1,951.1	2,032.4	2,086.6	2,130.7	2,183.1
Korea	424.0	411.9	443.4	488.9	545.2	602.0
Malaysia	69.7	81.7	87.6	98.4	112.1	126.3
New Zealand	76.7	68.9	75.9	80.6	84.6	89.9
Philippines	29.8	38.7	53.3	66.6	71.8	79.6
Singapore	118.8	127.2	131.2	137.0	141.9	146.6
Taiwan	207.8	236.7	266.4	291.8	333.1	369.5
Thailand	50.2	57.8	61.8	68.1	74.7	84.5
Vietnam	26.3	31.7	42.0	48.9	61.6	76.0
Rest of Asia/Pacific	20.3	25.5	27.6	37.4	48.7	62.6
AP Excluding Japan	2,812.2	3,014.6	3,403.9	3,850.5	4,381.4	4,998.4
Asia/Pacific total	4,777.7	4,965.8	5,436.3	5,937.1	6,512.1	7,181.5
Central and Eastern Europe						
Bulgaria	11.8	12.9	15.0	15.3	17.5	19.3
Croatia	23.8	28.7	31.7	35.2	40.1	45.8
Czech Republic	84.6	80.0	87.5	100.8	107.7	113.2
Hungary	61.9	64.1	70.4	75.1	81.5	86.8
Poland	124.1	147.0	165.5	165.4	175.1	183.0
Romania	38.2	43.6	44.0	50.0	55.8	62.3
Russia	249.5	258.8	306.5	357.2	405.2	447.3
Slovakia	37.9	30.0	32.7	37.1	39.4	42.2
Slovenia	21.9	25.6	30.5	34.8	37.6	39.2
Rest of Eastern Europe	112.3	124.4	138.4	156.3	174.9	197.9
Central and Eastern Europe total	765.9	815.1	922.1	1,027.2	1,134.8	1,236.8
Latin America						
Argentina	15.1	25.6	47.1	48.4	47.1	50.0
Brazil	200.3	195.1	197.7	198.3	199.1	200.1
Chile	21.5	21.2	22.2	22.9	23.8	24.5
Colombia	37.5	38.3	40.0	41.7	43.4	45.2
Mexico	112.2	116.6	122.3	128.6	134.2	139.6
Venezuela	15.0	11.2	11.7	17.6	18.6	19.4
Rest of Latin America	100.1	107.2	111.0	115.7	121.2	127.5
Latin America total	501.7	515.2	552.0	573.3	587.3	606.2

TABLE 439

WORLDWIDE VOLUME SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	20.2	18.7	24.1	26.1	27.7	29.3
Israel	165.3	164.0	181.3	192.1	204.8	212.5
Saudi Arabia	43.9	62.7	68.6	75.7	85.0	95.7
South Africa	137.1	135.9	160.9	169.1	181.6	186.0
Turkey	70.6	72.5	101.1	117.3	141.1	163.6
United Arab Emirates	36.6	41.3	47.9	50.2	53.6	56.9
Rest of Middle East/Africa	183.8	218.5	253.6	298.0	341.6	390.2
Middle East/Africa total	657.5	713.6	837.5	928.4	1,035.3	1,134.3
North America						
Canada	545.7	587.1	595.3	625.7	675.9	737.0
United States	8,495.7	9,641.0	10,646.0	11,140.9	11,943.3	12,209.7
North America total	9,041.4	10,228.1	11,241.3	11,766.6	12,619.2	12,946.7
Western Europe						
Austria	138.0	118.8	121.1	130.1	141.4	142.1
Belgium	185.0	157.7	156.7	167.1	183.9	184.5
Denmark	152.8	148.9	160.7	173.1	192.3	198.9
Finland	104.1	87.9	83.3	87.8	98.8	101.5
France	771.2	647.3	654.1	711.4	804.2	829.0
Germany	1,112.7	937.9	974.2	1,091.2	1,176.8	1,183.5
Greece	45.8	40.3	41.8	45.0	49.6	50.6
Ireland	75.4	55.6	50.5	51.3	53.6	51.6
Italy	499.1	554.8	662.6	766.1	885.1	940.1
Netherlands	303.4	259.1	273.8	301.6	336.9	346.8
Norway	120.4	102.6	97.8	102.4	108.4	108.3
Portugal	70.7	50.1	44.3	44.6	46.0	44.2
Spain	249.5	278.3	328.9	361.0	412.5	428.2
Sweden	208.6	180.5	179.5	187.9	199.1	199.5
Switzerland	237.1	217.1	247.5	284.2	321.2	334.1
United Kingdom	1,038.5	906.5	943.2	1,010.9	1,111.5	1,134.8
Western Europe total	5,312.2	4,743.5	5,020.0	5,515.7	6,121.1	6,277.7
Worldwide total	21,056.4	21,981.3	24,009.1	25,748.3	28,009.8	29,383.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 440

WORLDWIDE TOTAL SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	761.7	730.7	773.7	804.0	835.7	870.6
China	1,854.2	1,992.7	2,290.3	2,612.0	2,926.8	3,311.7
Hong Kong	250.2	241.0	255.6	268.6	282.8	298.5
India	292.9	329.9	355.1	387.3	441.4	502.1
Indonesia	124.4	135.4	146.3	163.4	184.6	208.9
Japan	7,447.1	6,847.1	6,788.0	6,487.0	6,303.2	6,133.4
Korea	1,376.1	1,327.8	1,426.9	1,513.5	1,596.0	1,683.2
Malaysia	158.1	166.1	174.0	188.7	208.7	228.8
New Zealand	106.7	93.1	101.2	107.0	111.6	117.6
Philippines	67.2	78.4	96.7	113.9	123.3	135.7
Singapore	287.3	274.0	285.0	301.3	314.0	327.4
Taiwan	421.2	442.4	484.6	520.2	564.0	605.3
Thailand	137.1	148.0	157.2	170.5	182.8	197.8
Vietnam	28.4	33.5	44.0	51.1	64.0	78.6
Rest of Asia/Pacific	90.0	90.0	99.8	119.1	135.5	154.3
AP Excluding Japan	5,955.5	6,083.1	6,690.4	7,320.5	7,971.3	8,720.5
Asia/Pacific total	13,402.5	12,930.2	13,478.4	13,807.5	14,274.5	14,853.9
Central and Eastern Europe						
Bulgaria	15.1	18.6	20.4	21.7	23.7	24.9
Croatia	42.7	45.7	49.8	58.2	63.4	69.8
Czech Republic	153.1	143.4	148.8	160.6	171.3	180.4
Hungary	99.8	102.4	112.5	116.3	119.6	127.1
Poland	235.6	228.8	248.5	254.0	273.5	293.9
Romania	44.2	52.1	49.9	59.2	66.4	72.6
Russia	325.0	330.8	386.6	450.9	514.0	578.2
Slovakia	57.0	54.2	56.6	65.2	70.5	73.5
Slovenia	36.0	39.8	44.0	46.8	53.0	53.8
Rest of Eastern Europe	135.3	151.6	166.2	190.3	210.7	237.9
Central and Eastern Europe total	1,143.7	1,167.4	1,283.3	1,423.1	1,566.2	1,712.1
Latin America						
Argentina	35.0	62.8	94.2	96.3	96.3	98.7
Brazil	618.1	512.2	522.2	534.2	546.6	559.1
Chile	52.3	46.7	47.1	47.0	48.2	49.2
Colombia	63.7	62.0	62.9	66.3	69.6	72.9
Mexico	296.5	294.4	308.4	323.6	335.4	347.1
Venezuela	59.0	33.7	36.4	51.7	55.5	58.7
Rest of Latin America	182.3	183.4	190.8	198.4	207.1	216.8
Latin America total	1,306.9	1,195.3	1,262.1	1,317.4	1,358.7	1,402.6

TABLE 440

WORLDWIDE TOTAL SERVERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	30.8	30.6	38.3	39.8	40.3	43.8
Israel	249.1	236.5	259.6	274.2	291.9	305.5
Saudi Arabia	95.2	109.5	115.5	135.9	143.1	154.7
South Africa	297.6	286.6	306.5	301.4	311.2	315.8
Turkey	97.9	94.7	141.0	169.3	198.6	238.6
United Arab Emirates	58.8	66.6	72.8	75.7	78.6	83.1
Rest of Middle East/Africa	220.5	251.6	306.2	362.3	419.4	477.1
Middle East/Africa total	1,049.9	1,076.1	1,239.8	1,358.5	1,483.1	1,618.7
North America						
Canada	1,271.6	1,304.6	1,350.3	1,394.8	1,438.1	1,479.8
United States	17,660.0	18,013.2	19,021.9	19,801.8	20,871.1	21,664.2
North America total	18,931.5	19,317.8	20,372.2	21,196.6	22,309.2	23,144.0
Western Europe						
Austria	315.8	259.4	262.8	275.1	284.2	287.9
Belgium	442.3	348.5	345.8	356.4	364.1	364.4
Denmark	276.5	266.1	288.2	312.0	341.2	361.2
Finland	248.5	191.7	189.1	195.1	207.5	214.1
France	2,111.8	1,722.6	1,738.0	1,806.9	1,863.3	1,882.9
Germany	3,347.2	2,804.0	2,830.3	3,013.7	2,967.4	2,919.5
Greece	77.1	68.5	72.0	77.1	81.8	85.0
Ireland	138.1	98.1	92.9	92.9	92.3	89.7
Italy	1,357.2	1,438.1	1,559.5	1,676.3	1,824.5	1,938.9
Netherlands	614.2	532.9	555.1	590.7	621.2	640.2
Norway	215.0	170.0	169.2	174.1	177.5	177.6
Portugal	131.9	90.0	83.8	83.0	81.6	78.5
Spain	617.8	660.0	706.4	743.6	808.7	851.5
Sweden	380.8	316.9	322.6	337.2	349.8	355.9
Switzerland	572.7	525.8	562.0	602.8	644.5	675.2
United Kingdom	2,505.4	2,067.1	2,094.4	2,201.4	2,282.3	2,318.4
Western Europe total	13,352.4	11,559.7	11,872.1	12,538.4	12,991.9	13,240.9
Worldwide total	49,186.9	47,246.5	49,507.9	51,641.5	53,983.5	55,972.3

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 441

WORLDWIDE PERSONAL COMPUTERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	2,885.6	3,120.3	3,070.7	3,000.2	2,875.4	2,790.2
China	9,084.3	9,124.1	10,140.3	11,773.1	13,379.1	15,168.5
Hong Kong	738.0	665.7	673.5	710.4	740.4	760.8
India	1,737.5	1,998.3	2,489.8	3,262.6	4,347.2	5,281.3
Indonesia	504.0	529.8	545.5	580.8	628.7	672.6
Japan	18,820.0	18,033.8	18,469.2	18,940.7	19,360.4	19,545.3
Korea	3,437.7	3,244.2	3,541.9	3,829.4	4,066.7	4,226.0
Malaysia	780.9	784.6	813.9	889.9	986.5	1,080.0
New Zealand	447.5	408.9	425.8	442.0	460.3	478.6
Philippines	298.2	333.4	412.8	477.5	533.7	620.1
Singapore	608.6	571.1	579.3	557.2	542.3	530.2
Taiwan	1,293.2	1,340.8	1,425.6	1,557.1	1,719.1	1,896.1
Thailand	745.4	796.3	694.4	760.4	818.7	891.6
Vietnam	200.7	230.4	265.3	322.0	383.9	448.7
Rest of Asia/Pacific	278.4	286.9	367.5	508.3	689.0	912.3
AP Excluding Japan	23,039.9	23,434.9	25,446.5	28,671.0	32,171.1	35,757.0
Asia/Pacific total	41,859.9	41,468.7	43,915.7	47,611.8	51,531.5	55,302.3
Central and Eastern Europe						
Bulgaria	70.5	75.7	87.9	97.3	109.3	121.2
Croatia	140.0	150.3	150.4	156.1	166.4	181.3
Czech Republic	396.2	393.5	398.2	437.8	468.1	490.3
Hungary	269.8	301.6	346.8	380.9	400.2	415.9
Poland	839.2	966.6	1,137.4	1,218.9	1,336.3	1,451.1
Romania	183.2	187.3	191.3	202.7	225.4	247.7
Russia	1,628.0	1,661.8	1,915.0	2,184.1	2,442.8	2,760.8
Slovakia	127.1	133.3	133.8	143.3	158.7	170.8
Slovenia	111.6	121.7	135.6	146.7	155.3	159.9
Rest of Eastern Europe	746.0	844.5	940.0	1,087.7	1,267.7	1,399.4
Central and Eastern Europe total	4,511.7	4,836.5	5,436.5	6,055.5	6,730.1	7,398.2
Latin America						
Argentina	129.4	299.4	486.5	617.6	740.0	805.5
Brazil	2,714.5	2,622.8	2,689.8	2,754.0	2,807.5	2,852.8
Chile	319.7	326.8	334.9	345.8	359.3	369.4
Colombia	379.8	374.3	392.6	394.7	359.0	361.4
Mexico	2,458.3	2,296.1	2,391.2	2,518.3	2,624.1	2,743.3
Venezuela	210.3	90.3	100.2	119.4	138.9	143.2
Rest of Latin America	1,137.6	1,070.8	1,084.4	1,115.8	1,142.4	1,161.5
Latin America total	7,349.6	7,080.4	7,479.7	7,865.6	8,171.2	8,437.0

TABLE 441

WORLDWIDE PERSONAL COMPUTERS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	141.2	185.8	199.1	211.0	232.3	254.3
Israel	565.0	521.2	535.9	572.4	605.6	629.8
Saudi Arabia	342.6	353.6	427.1	527.4	626.1	708.4
South Africa	732.2	759.3	835.3	899.4	930.0	939.0
Turkey	395.1	505.6	626.1	767.1	933.8	1,161.2
United Arab Emirates	271.6	309.4	318.5	326.5	334.0	344.8
Rest of Middle East/Africa	1,338.2	1,461.1	1,641.5	1,808.0	2,011.4	2,221.0
Middle East/Africa total	3,785.9	4,096.1	4,583.5	5,111.7	5,673.2	6,258.4
North America						
Canada	3,603.3	3,271.8	3,022.5	2,931.6	2,840.2	2,742.1
United States	50,846.7	45,956.3	46,734.9	47,049.7	45,174.7	42,707.8
North America total	54,450.0	49,228.2	49,757.3	49,981.3	48,014.9	45,449.9
Western Europe						
Austria	960.3	908.6	879.4	905.9	925.2	972.1
Belgium	1,040.4	1,016.4	965.2	987.7	986.1	1,005.1
Denmark	909.2	898.6	893.4	853.8	819.7	795.2
Finland	734.7	688.4	646.8	641.3	617.7	602.8
France	6,355.2	6,017.8	5,834.6	5,935.3	5,851.6	6,018.2
Germany	9,489.7	8,447.1	7,930.3	7,992.4	7,929.9	8,316.1
Greece	462.5	455.4	453.8	464.4	499.3	526.4
Ireland	471.0	451.0	456.8	477.5	487.5	505.9
Italy	3,877.9	3,850.9	3,869.3	4,205.9	4,314.8	4,538.8
Netherlands	2,245.2	2,074.5	1,903.7	1,950.6	2,009.8	2,041.6
Norway	797.1	828.4	801.7	813.4	830.6	864.2
Portugal	568.1	533.2	522.3	548.8	581.6	603.3
Spain	2,330.4	2,603.4	2,693.0	2,874.1	2,980.6	3,167.8
Sweden	1,789.8	1,448.2	1,370.0	1,348.6	1,347.3	1,395.5
Switzerland	1,468.2	1,456.5	1,444.6	1,484.6	1,518.9	1,517.5
United Kingdom	9,024.4	8,625.9	8,613.2	8,543.6	8,491.1	8,832.9
Western Europe total	42,524.0	40,304.3	39,278.2	40,027.9	40,191.6	41,703.5
Worldwide total	154,481.0	147,014.1	150,450.8	156,653.7	160,312.6	164,549.5

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 442

WORLDWIDE TRADITIONAL WORKSTATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	14.5	9.9	8.4	6.7	6.0	5.5
China	52.3	47.2	44.9	44.2	43.4	42.6
Hong Kong	2.5	2.4	2.3	2.1	2.0	1.8
India	20.3	16.4	15.2	13.3	11.8	10.4
Indonesia	2.0	2.1	1.9	1.7	1.6	1.4
Japan	238.4	159.3	121.1	99.3	85.4	75.7
Korea	47.7	38.3	39.6	29.3	22.7	18.4
Malaysia	6.4	4.4	4.3	4.3	4.2	4.0
New Zealand	1.1	0.7	0.6	0.6	0.5	0.5
Philippines	0.9	0.7	0.6	0.6	0.5	0.5
Singapore	12.0	12.0	11.7	10.5	9.4	8.4
Taiwan	12.7	11.7	11.6	10.9	10.3	9.4
Thailand	2.0	1.8	1.6	1.4	1.3	1.1
Vietnam	1.7	1.8	1.9	2.0	1.8	1.7
Rest of Asia/Pacific	5.9	6.4	7.3	7.4	7.2	7.1
AP Excluding Japan	181.9	155.8	151.7	134.8	122.7	112.9
Asia/Pacific total	420.3	315.2	272.8	234.1	208.1	188.6
Central and Eastern Europe						
Bulgaria	0.2	0.2	0.2	0.2	0.2	0.2
Croatia	0.6	0.5	0.4	0.4	0.3	0.3
Czech Republic	5.9	5.8	5.2	5.3	6.2	4.9
Hungary	1.3	1.4	1.3	1.3	1.3	1.2
Poland	3.4	3.0	2.7	2.4	2.2	2.1
Romania	0.4	0.3	0.3	0.3	0.3	0.3
Russia	5.1	4.2	3.4	2.7	2.4	2.2
Slovakia	1.0	0.9	0.8	0.7	0.7	0.7
Slovenia	0.8	0.7	0.6	0.6	0.5	0.5
Rest of Eastern Europe	4.8	3.9	3.4	3.0	2.7	2.5
Central and Eastern Europe total	23.6	21.0	18.4	16.8	16.8	14.9
Latin America						
Argentina	1.9	3.7	5.3	6.0	5.3	4.0
Brazil	72.4	62.8	55.3	53.8	46.0	28.5
Chile	2.2	2.1	2.1	2.1	2.0	1.1
Colombia	5.0	4.4	4.1	3.8	3.0	14.5
Mexico	11.9	8.8	7.3	6.0	2.7	27.4
Venezuela	7.0	2.3	2.0	1.9	1.1	0.1
Rest of Latin America	24.9	21.6	20.4	19.1	17.2	12.8
Latin America total	125.2	105.8	96.5	92.7	77.3	88.5

TABLE 442

WORLDWIDE TRADITIONAL WORKSTATIONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	3.6	4.2	3.8	3.3	3.5	3.1
Israel	31.9	27.0	22.8	18.8	15.3	11.4
Saudi Arabia	4.0	4.1	4.2	4.2	3.6	3.1
South Africa	7.8	7.5	7.3	7.0	6.6	6.1
Turkey	2.7	3.8	5.1	6.3	7.2	7.3
United Arab Emirates	0.9	0.7	0.6	0.5	0.5	0.4
Rest of Middle East/Africa	10.2	9.2	10.4	11.8	12.2	12.3
Middle East/Africa total	61.2	56.4	54.1	51.8	48.8	43.8
North America						
Canada	117.1	112.2	107.7	102.9	98.6	94.8
United States	945.7	494.6	281.9	169.2	106.6	69.3
North America total	1,062.9	606.8	389.7	272.0	205.1	164.1
Western Europe						
Austria	12.4	15.8	7.8	6.5	5.4	4.7
Belgium	11.2	10.1	6.4	5.3	4.5	3.9
Denmark	8.9	4.2	5.1	4.2	3.6	3.1
Finland	9.6	6.3	5.5	4.6	3.8	3.3
France	96.0	99.0	61.3	51.0	43.1	37.5
Germany	231.0	225.8	166.7	138.8	117.3	102.1
Greece	3.0	2.2	1.4	1.2	1.0	0.8
Ireland	8.0	5.8	4.0	3.3	2.8	2.4
Italy	44.7	34.9	39.7	33.0	27.8	24.2
Netherlands	30.1	23.3	20.3	16.8	14.2	12.3
Norway	9.5	4.1	5.6	4.7	4.0	3.6
Portugal	1.7	1.3	1.0	1.0	0.8	0.8
Spain	18.1	12.7	11.2	9.3	7.8	6.8
Sweden	34.0	22.2	22.4	18.6	15.7	13.7
Switzerland	24.1	14.6	14.5	11.4	9.6	8.3
United Kingdom	119.2	87.5	84.2	71.1	60.7	53.2
Western Europe total	661.5	569.9	457.2	380.8	322.1	280.6
Worldwide total	2,354.5	1,675.2	1,288.7	1,048.2	878.2	780.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 443

WORLDWIDE TOTAL CLIENTS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	2,900.0	3,130.2	3,079.0	3,006.9	2,881.4	2,795.7
China	9,136.6	9,171.3	10,185.2	11,817.3	13,422.5	15,211.0
Hong Kong	740.5	668.2	675.8	712.5	742.3	762.6
India	1,757.8	2,014.7	2,505.0	3,275.8	4,359.0	5,291.6
Indonesia	505.9	531.9	547.4	582.5	630.3	674.0
Japan	19,058.4	18,193.1	18,590.3	19,040.0	19,445.8	19,621.0
Korea	3,485.4	3,282.5	3,581.5	3,858.7	4,089.4	4,244.4
Malaysia	787.4	789.0	818.2	894.2	990.7	1,084.0
New Zealand	448.6	409.6	426.4	442.6	460.8	479.1
Philippines	299.0	334.1	413.4	478.1	534.2	620.6
Singapore	620.7	583.1	591.0	567.7	551.7	538.7
Taiwan	1,305.9	1,352.5	1,437.2	1,567.9	1,729.4	1,905.5
Thailand	747.4	798.1	696.0	761.9	819.9	892.7
Vietnam	202.3	232.2	267.2	324.0	385.8	450.4
Rest of Asia/Pacific	284.2	293.3	374.8	515.7	696.2	919.3
AP Excluding Japan	23,221.8	23,590.7	25,598.2	28,805.9	32,293.8	35,869.9
Asia/Pacific total	42,280.2	41,783.9	44,188.5	47,845.9	51,739.6	55,490.9
Central and Eastern Europe						
Bulgaria	70.8	75.9	88.1	97.5	109.4	121.4
Croatia	140.6	150.8	150.8	156.5	166.8	181.6
Czech Republic	402.1	399.3	403.4	443.2	474.3	495.2
Hungary	271.2	303.0	348.1	382.2	401.4	417.1
Poland	842.6	969.6	1,140.1	1,221.3	1,338.4	1,453.2
Romania	183.6	187.7	191.7	203.0	225.7	247.9
Russia	1,633.1	1,666.0	1,918.4	2,186.8	2,445.2	2,763.0
Slovakia	128.1	134.2	134.6	144.0	159.4	171.5
Slovenia	112.4	122.5	136.2	147.3	155.8	160.4
Rest of Eastern Europe	750.8	848.4	943.5	1,090.7	1,270.4	1,401.9
Central and Eastern Europe total	4,535.2	4,857.5	5,454.9	6,072.4	6,746.9	7,413.1
Latin America						
Argentina	131.3	303.2	491.9	623.6	745.3	809.5
Brazil	2,786.9	2,685.7	2,745.1	2,807.8	2,853.5	2,881.3
Chile	321.9	328.9	337.1	347.9	361.4	370.5
Colombia	384.7	378.7	396.7	398.5	362.0	375.9
Mexico	2,470.3	2,304.9	2,398.5	2,524.3	2,626.8	2,770.7
Venezuela	217.3	92.5	102.2	121.3	139.9	143.3
Rest of Latin America	1,162.5	1,092.4	1,104.7	1,134.9	1,159.6	1,174.2
Latin America total	7,474.8	7,186.2	7,576.2	7,958.2	8,248.5	8,525.5

TABLE 443

WORLDWIDE TOTAL CLIENTS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	144.8	190.0	202.9	214.3	235.8	257.4
Israel	597.0	548.2	558.7	591.1	620.9	641.2
Saudi Arabia	346.5	357.7	431.3	531.5	629.7	711.5
South Africa	740.0	766.8	842.6	906.3	936.6	945.1
Turkey	397.8	509.4	631.2	773.4	941.0	1,168.6
United Arab Emirates	272.5	310.1	319.0	327.0	334.5	345.2
Rest of Middle East/Africa	1,348.4	1,470.3	1,652.0	1,819.8	2,023.5	2,233.4
Middle East/Africa total	3,847.1	4,152.5	4,637.6	5,163.5	5,722.0	6,302.3
North America						
Canada	3,720.4	3,384.0	3,130.2	3,034.5	2,938.8	2,836.9
United States	51,792.4	46,451.0	47,016.8	47,218.8	45,281.3	42,777.1
North America total	55,512.8	49,835.0	50,147.0	50,253.3	48,220.1	45,614.0
Western Europe						
Austria	972.6	924.5	887.2	912.4	930.6	976.8
Belgium	1,051.6	1,026.5	971.7	993.0	990.6	1,009.0
Denmark	918.1	902.7	898.6	858.0	823.3	798.3
Finland	744.3	694.7	652.3	645.9	621.5	606.1
France	6,451.1	6,116.8	5,895.9	5,986.2	5,894.7	6,055.7
Germany	9,720.7	8,673.0	8,097.0	8,131.1	8,047.2	8,418.3
Greece	465.5	457.6	455.3	465.6	500.3	527.2
Ireland	479.0	456.8	460.8	480.8	490.2	508.2
Italy	3,922.6	3,885.8	3,909.0	4,238.8	4,342.6	4,563.0
Netherlands	2,275.3	2,097.8	1,924.0	1,967.4	2,024.0	2,053.9
Norway	806.5	832.5	807.3	818.2	834.7	867.8
Portugal	569.9	534.5	523.3	549.7	582.4	604.1
Spain	2,348.5	2,616.2	2,704.2	2,883.4	2,988.5	3,174.6
Sweden	1,823.8	1,470.3	1,392.4	1,367.3	1,363.0	1,409.1
Switzerland	1,492.3	1,471.1	1,459.1	1,496.0	1,528.6	1,525.9
United Kingdom	9,143.6	8,713.4	8,697.5	8,614.7	8,551.7	8,886.1
Western Europe total	43,185.4	40,874.2	39,735.3	40,408.6	40,513.8	41,984.1
Worldwide total	156,835.6	148,689.3	151,739.5	157,701.9	161,190.8	165,329.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 444

WORLDWIDE SYSTEMS TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	3,661.8	3,860.9	3,852.7	3,810.9	3,717.0	3,666.4
China	10,990.8	11,164.0	12,475.4	14,429.3	16,349.3	18,522.7
Hong Kong	990.7	909.2	931.4	981.1	1,025.2	1,061.1
India	2,050.7	2,344.6	2,860.1	3,663.1	4,800.4	5,793.8
Indonesia	630.4	667.4	693.7	746.0	814.9	883.0
Japan	26,505.5	25,040.2	25,378.4	25,527.0	25,749.0	25,754.4
Korea	4,861.5	4,610.3	5,008.4	5,372.2	5,685.5	5,927.6
Malaysia	945.5	955.1	992.2	1,082.9	1,199.4	1,312.8
New Zealand	555.3	502.7	527.7	549.6	572.5	596.7
Philippines	366.2	412.5	510.0	592.0	657.5	756.3
Singapore	908.0	857.1	876.0	869.0	865.7	866.1
Taiwan	1,727.2	1,794.9	1,921.8	2,088.1	2,293.4	2,510.8
Thailand	884.5	946.0	853.2	932.4	1,002.7	1,090.6
Vietnam	230.7	265.7	311.2	375.1	449.8	529.1
Rest of Asia/Pacific	374.2	383.3	474.6	634.8	831.8	1,073.6
AP Excluding Japan	29,177.3	29,673.8	32,288.6	36,126.4	40,265.1	44,590.4
Asia/Pacific total	55,682.8	54,714.0	57,666.9	61,653.3	66,014.0	70,344.8
Central and Eastern Europe						
Bulgaria	85.9	94.5	108.5	119.2	133.1	146.2
Croatia	183.3	196.5	200.6	214.7	230.2	251.3
Czech Republic	555.2	542.8	552.3	603.8	645.6	675.6
Hungary	371.0	405.4	460.5	498.5	521.0	544.3
Poland	1,078.1	1,198.4	1,388.6	1,475.3	1,612.0	1,747.0
Romania	227.8	239.8	241.5	262.1	292.2	320.5
Russia	1,958.0	1,996.8	2,305.0	2,637.6	2,959.2	3,341.2
Slovakia	185.1	188.4	191.2	209.2	229.9	245.0
Slovenia	148.4	162.3	180.2	194.1	208.8	214.2
Rest of Eastern Europe	886.1	1,000.0	1,109.6	1,281.0	1,481.1	1,639.8
Central and Eastern Europe total	5,678.9	6,024.9	6,738.1	7,495.5	8,313.1	9,125.2
Latin America						
Argentina	166.3	366.0	586.1	719.9	841.6	908.2
Brazil	3,405.0	3,197.8	3,267.3	3,342.0	3,400.1	3,440.5
Chile	374.2	375.7	384.2	394.9	409.6	419.7
Colombia	448.4	440.7	459.6	464.8	431.6	448.8
Mexico	2,766.8	2,599.3	2,706.9	2,847.9	2,962.2	3,117.8
Venezuela	276.3	126.2	138.7	172.9	195.4	202.0
Rest of Latin America	1,344.8	1,275.8	1,295.6	1,333.3	1,366.8	1,391.1
Latin America total	8,781.7	8,381.6	8,838.3	9,275.6	9,607.2	9,928.0

TABLE 444

WORLDWIDE SYSTEMS TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	175.6	220.7	241.3	254.1	276.0	301.2
Israel	846.0	784.8	818.3	865.4	912.8	946.7
Saudi Arabia	441.7	467.2	546.8	667.4	772.7	866.2
South Africa	1,037.6	1,053.4	1,149.0	1,207.8	1,247.8	1,260.9
Turkey	495.7	604.1	772.2	942.7	1,139.6	1,407.2
United Arab Emirates	331.3	376.7	391.8	402.7	413.2	428.2
Rest of Middle East/Africa	1,568.9	1,721.8	1,958.1	2,182.1	2,443.0	2,710.5
Middle East/Africa total	4,896.9	5,228.6	5,877.5	6,522.0	7,205.1	7,921.0
North America						
Canada	4,992.0	4,688.7	4,480.5	4,429.3	4,376.9	4,316.7
United States	69,452.4	64,464.1	66,038.7	67,020.7	66,152.4	64,441.3
North America total	74,444.4	69,152.8	70,519.2	71,450.0	70,529.2	68,758.0
Western Europe						
Austria	1,288.4	1,183.9	1,150.0	1,187.5	1,214.8	1,264.6
Belgium	1,493.9	1,375.0	1,317.4	1,349.4	1,354.7	1,373.4
Denmark	1,194.7	1,168.9	1,186.8	1,170.0	1,164.5	1,159.5
Finland	992.7	886.5	841.4	841.0	829.0	820.2
France	8,562.9	7,839.5	7,633.8	7,793.1	7,758.0	7,938.6
Germany	13,067.8	11,476.9	10,927.3	11,144.9	11,014.6	11,337.8
Greece	542.6	526.1	527.3	542.7	582.0	612.3
Ireland	617.2	554.9	553.6	573.7	582.5	597.9
Italy	5,279.8	5,323.9	5,468.5	5,915.2	6,167.1	6,501.9
Netherlands	2,889.4	2,630.7	2,479.1	2,558.1	2,645.2	2,694.2
Norway	1,021.5	1,002.4	976.5	992.2	1,012.2	1,045.4
Portugal	701.8	624.5	607.1	632.8	664.0	682.6
Spain	2,966.3	3,276.1	3,410.6	3,627.0	3,797.1	4,026.2
Sweden	2,204.6	1,787.2	1,715.0	1,704.5	1,712.9	1,765.0
Switzerland	2,065.0	1,996.9	2,021.1	2,098.8	2,173.1	2,201.1
United Kingdom	11,649.1	10,780.5	10,791.9	10,816.1	10,834.0	11,204.5
Western Europe total	56,537.8	52,433.9	51,607.4	52,947.0	53,505.7	55,225.1
Worldwide total	206,022.5	195,935.8	201,247.4	209,343.4	215,174.3	221,302.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 445

WORLDWIDE DISK SYSTEMS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	391.6	372.2	385.2	413.8	456.9	466.8
China	635.1	696.4	759.2	824.0	866.6	901.1
Hong Kong	95.9	91.1	90.5	92.9	94.3	92.7
India	103.1	117.4	130.0	149.1	174.9	198.9
Indonesia	34.6	38.8	41.4	43.7	45.9	47.7
Japan	2,940.0	2,786.5	2,825.8	2,879.5	2,945.0	3,017.8
Korea	590.2	496.1	520.3	551.7	575.5	576.3
Malaysia	71.3	66.1	68.4	71.2	80.9	90.6
New Zealand	43.2	36.8	38.4	39.5	39.7	39.0
Philippines	30.4	26.7	30.0	30.9	31.2	30.6
Singapore	115.1	95.1	93.8	94.9	95.3	96.4
Taiwan	160.9	146.8	149.1	151.0	148.1	145.6
Thailand	47.9	43.9	43.1	45.3	47.3	47.3
Vietnam	8.3	9.7	11.4	12.5	13.6	14.0
Rest of Asia/Pacific	56.4	62.6	73.1	84.0	90.0	92.0
AP Excluding Japan	2,384.1	2,299.8	2,433.7	2,604.6	2,760.0	2,838.9
Asia/Pacific total	5,324.0	5,086.3	5,259.6	5,484.0	5,705.0	5,856.8
Central and Eastern Europe						
Bulgaria	4.2	4.6	5.0	5.5	6.4	7.1
Croatia	9.4	9.5	10.5	12.1	13.7	15.0
Czech Republic	50.0	51.3	57.9	65.2	65.4	69.4
Hungary	42.2	44.1	47.3	52.3	58.2	61.1
Poland	61.7	66.0	80.3	94.7	113.9	126.5
Romania	6.2	7.0	9.1	10.0	12.3	15.5
Russia	60.1	74.8	88.3	103.6	122.7	140.6
Slovakia	12.2	11.9	13.6	16.7	19.0	21.5
Slovenia	7.6	7.8	10.4	12.1	14.7	15.9
Rest of Eastern Europe	26.3	30.1	36.6	41.2	47.3	55.8
Central and Eastern Europe total	279.8	307.1	359.0	413.3	473.7	528.3
Latin America						
Argentina	20.9	38.7	56.1	77.4	98.3	121.8
Brazil	253.4	271.9	294.4	316.9	338.3	357.1
Chile	16.8	18.5	20.3	22.2	24.2	26.1
Colombia	28.1	33.1	38.4	43.8	49.1	54.0
Mexico	156.6	170.7	189.5	207.5	226.2	244.3
Venezuela	59.0	38.6	44.2	51.0	60.2	72.9
Rest of Latin America	73.6	84.6	96.0	108.3	121.0	134.4
Latin America total	608.4	656.2	738.9	827.0	917.2	1,010.7

TABLE 445

WORLDWIDE DISK SYSTEMS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	6.2	7.3	9.4	11.5	12.3	12.6
Israel	79.0	85.3	95.1	103.0	120.8	140.2
Saudi Arabia	46.0	40.9	41.9	42.3	44.6	49.2
South Africa	58.4	70.4	77.6	83.3	90.6	98.2
Turkey	30.4	39.5	47.4	66.5	85.9	93.8
United Arab Emirates	19.3	20.4	20.8	22.5	22.7	25.2
Rest of Middle East/Africa	36.2	43.0	51.6	62.0	78.8	97.7
Middle East/Africa total	275.4	306.9	343.8	391.1	455.7	516.8
North America						
Canada	686.7	672.3	689.8	710.5	740.9	763.8
United States	7,939.0	7,821.0	7,835.0	8,038.0	8,287.8	8,506.4
North America total	8,625.7	8,493.3	8,524.8	8,748.5	9,028.7	9,270.2
Western Europe						
Austria	151.8	146.2	144.3	148.7	152.9	156.8
Belgium	220.8	212.6	210.0	216.3	222.4	228.2
Denmark	160.0	154.1	152.1	156.7	161.2	165.3
Finland	80.4	77.4	76.4	78.7	81.0	83.1
France	873.8	841.5	830.8	855.8	880.0	902.9
Germany	1,618.3	1,558.4	1,538.6	1,584.9	1,629.8	1,672.2
Greece	14.9	14.3	14.1	14.6	15.0	15.4
Ireland	89.1	85.8	84.7	87.3	89.8	92.1
Italy	668.3	643.6	635.4	654.5	673.1	690.6
Netherlands	282.7	272.2	268.8	276.9	284.7	292.1
Norway	88.8	85.5	84.5	87.0	89.5	91.8
Portugal	41.6	40.0	39.5	40.7	41.9	42.9
Spain	304.1	292.9	289.1	297.8	306.3	314.2
Sweden	179.8	173.1	170.9	176.1	181.0	185.7
Switzerland	325.4	313.4	309.4	318.7	327.7	336.3
United Kingdom	1,367.2	1,316.6	1,299.9	1,339.0	1,376.9	1,412.7
Western Europe total	6,467.0	6,227.6	6,148.7	6,333.6	6,512.9	6,682.3
Worldwide total	21,580.4	21,077.4	21,374.7	22,197.6	23,093.2	23,865.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 446

WORLDWIDE TAPE AUTOMATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	60.3	57.4	58.1	59.0	60.3	61.6
China	72.3	83.1	88.6	94.9	100.5	105.8
Hong Kong	14.1	14.6	15.0	15.4	15.8	16.2
India	16.5	18.8	20.2	21.2	22.4	23.8
Indonesia	6.2	4.7	4.9	5.1	5.4	5.8
Japan	456.4	463.2	486.4	513.2	536.3	558.8
Korea	52.1	55.8	57.3	59.5	61.5	63.1
Malaysia	15.5	15.3	15.9	16.7	17.5	18.2
New Zealand	7.6	7.2	7.4	7.5	7.7	7.9
Philippines	3.0	2.8	3.2	3.4	3.5	3.6
Singapore	22.2	22.5	22.6	23.3	23.7	24.3
Taiwan	16.9	19.5	20.0	20.7	21.4	22.0
Thailand	6.7	6.7	6.9	7.2	7.4	7.6
Vietnam	1.7	1.6	1.7	1.7	1.8	1.9
Rest of Asia/Pacific	4.9	4.8	4.9	5.1	5.3	5.5
AP Excluding Japan	299.8	314.8	326.5	340.9	354.3	367.3
Asia/Pacific total	756.2	778.0	812.9	854.0	890.5	926.1
Central and Eastern Europe						
Bulgaria	1.9	1.9	1.8	2.0	2.0	2.0
Croatia	2.7	2.5	2.8	2.9	3.2	3.2
Czech Republic	12.1	12.3	12.0	12.5	12.7	12.7
Hungary	7.2	7.4	8.2	8.1	8.3	8.2
Poland	17.1	19.0	18.3	19.1	19.1	19.6
Romania	2.9	3.1	2.5	3.0	3.0	3.1
Russia	26.2	26.0	27.1	29.2	31.0	33.2
Slovakia	3.2	3.6	3.5	4.1	4.4	4.5
Slovenia	3.2	3.5	3.4	3.7	3.8	3.8
Rest of Eastern Europe	6.4	6.6	7.4	8.1	9.6	10.2
Central and Eastern Europe total	82.8	85.7	87.0	92.8	97.2	100.6
Latin America						
Argentina	5.2	9.1	12.7	17.0	20.8	25.0
Brazil	92.9	95.7	99.6	103.5	107.0	110.3
Chile	4.2	4.3	4.6	4.9	5.1	5.3
Colombia	7.0	7.8	8.7	9.6	10.4	11.1
Mexico	39.2	40.1	43.0	45.6	48.0	50.0
Venezuela	14.8	9.1	10.0	11.2	12.8	14.9
Rest of Latin America	18.4	19.8	21.8	23.8	25.7	27.5
Latin America total	181.6	185.8	200.5	215.5	229.8	244.2

TABLE 446

WORLDWIDE TAPE AUTOMATION SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	2.9	3.3	3.7	4.0	4.0	4.5
Israel	17.0	18.8	18.1	19.8	20.9	24.1
Saudi Arabia	8.7	9.1	9.2	9.4	9.8	10.9
South Africa	35.3	37.8	35.4	36.2	35.4	37.6
Turkey	6.6	6.9	9.4	12.8	15.8	17.9
United Arab Emirates	4.2	4.9	5.1	5.3	5.3	5.8
Rest of Middle East/Africa	14.4	16.9	18.8	22.0	25.0	29.0
Middle East/Africa total	89.2	97.8	99.8	109.6	116.2	129.8
North America						
Canada	119.5	117.0	111.8	110.1	111.1	110.8
United States	1,221.9	1,256.2	1,308.9	1,378.3	1,467.9	1,580.9
North America total	1,341.4	1,373.1	1,420.7	1,488.4	1,579.0	1,691.7
Western Europe						
Austria	6.8	4.1	3.9	3.8	3.6	3.6
Belgium	8.2	5.2	4.9	4.6	5.4	5.5
Denmark	11.8	10.3	10.9	11.4	11.3	11.4
Finland	10.8	11.6	11.1	10.9	10.6	10.8
France	70.6	59.8	59.1	59.2	63.9	65.1
Germany	117.2	114.2	108.4	104.0	95.8	98.0
Greece	2.6	1.5	1.6	1.7	2.3	2.3
Ireland	11.0	12.0	13.0	14.0	15.0	16.0
Italy	29.2	21.3	21.4	21.7	27.1	27.4
Netherlands	19.1	18.2	19.2	20.5	24.4	25.1
Norway	10.0	7.9	8.3	8.7	8.4	8.8
Portugal	4.0	3.0	2.9	3.1	4.2	4.3
Spain	16.4	11.7	12.5	13.4	18.1	18.2
Sweden	17.4	17.0	17.3	17.9	17.6	17.7
Switzerland	25.7	18.1	19.4	20.9	24.3	24.8
United Kingdom	117.3	111.5	112.0	114.0	101.5	104.2
Western Europe total	478.0	427.4	425.8	429.8	433.5	443.2
Worldwide total	2,929.3	2,947.9	3,046.8	3,190.0	3,346.2	3,535.4

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 447

WORLDWIDE STORAGE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	451.9	429.6	443.2	472.9	517.1	528.4
China	707.4	779.5	847.8	918.9	967.2	1,006.9
Hong Kong	110.0	105.7	105.4	108.3	110.1	108.9
India	119.6	136.2	150.1	170.3	197.3	222.7
Indonesia	40.8	43.5	46.2	48.9	51.4	53.6
Japan	3,396.4	3,249.7	3,312.2	3,392.6	3,481.2	3,576.6
Korea	642.3	552.0	577.6	611.2	637.1	639.4
Malaysia	86.9	81.4	84.3	87.9	98.3	108.8
New Zealand	50.7	43.9	45.8	47.0	47.4	46.9
Philippines	33.4	29.6	33.2	34.3	34.7	34.2
Singapore	137.4	117.6	116.4	118.1	119.0	120.6
Taiwan	177.7	166.3	169.1	171.8	169.5	167.6
Thailand	54.6	50.6	50.1	52.5	54.7	54.9
Vietnam	9.9	11.4	13.0	14.3	15.4	15.8
Rest of Asia/Pacific	61.2	67.4	78.0	89.1	95.3	97.5
AP Excluding Japan	2,683.9	2,614.6	2,760.2	2,945.5	3,114.3	3,206.2
Asia/Pacific total	6,080.2	5,864.3	6,072.5	6,338.1	6,595.6	6,782.8
Central and Eastern Europe						
Bulgaria	6.0	6.4	6.9	7.6	8.4	9.2
Croatia	12.1	12.0	13.3	15.0	16.9	18.2
Czech Republic	62.1	63.6	69.9	77.7	78.1	82.1
Hungary	49.4	51.5	55.5	60.4	66.5	69.3
Poland	78.8	85.0	98.6	113.8	133.0	146.1
Romania	9.1	10.1	11.7	13.0	15.3	18.6
Russia	86.2	100.7	115.4	132.8	153.7	173.8
Slovakia	15.4	15.5	17.1	20.8	23.4	26.0
Slovenia	10.8	11.2	13.7	15.7	18.6	19.7
Rest of Eastern Europe	32.6	36.7	44.0	49.3	57.0	66.0
Central and Eastern Europe total	362.6	392.8	446.0	506.1	570.9	628.9
Latin America						
Argentina	26.1	47.7	68.8	94.4	119.1	146.8
Brazil	346.3	367.6	394.0	420.4	445.3	467.4
Chile	21.0	22.9	24.9	27.0	29.3	31.4
Colombia	35.1	40.9	47.2	53.4	59.5	65.0
Mexico	195.8	210.8	232.6	253.1	274.2	294.4
Venezuela	73.8	47.7	54.3	62.2	72.9	87.9
Rest of Latin America	91.9	104.4	117.8	132.0	146.7	161.9
Latin America total	790.0	842.0	939.4	1,042.5	1,147.0	1,254.8

TABLE 447

WORLDWIDE STORAGE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	9.1	10.6	13.2	15.5	16.4	17.0
Israel	96.0	104.1	113.2	122.8	141.7	164.4
Saudi Arabia	54.7	50.0	51.1	51.8	54.4	60.1
South Africa	93.7	108.2	113.0	119.5	126.0	135.8
Turkey	36.9	46.4	56.8	79.3	101.6	111.7
United Arab Emirates	23.5	25.3	25.9	27.8	28.1	31.0
Rest of Middle East/Africa	50.6	59.9	70.4	84.0	103.8	126.6
Middle East/Africa total	364.6	404.7	443.6	500.6	571.9	646.6
North America						
Canada	806.2	789.3	801.6	820.6	852.0	874.6
United States	9,160.9	9,077.2	9,143.9	9,416.3	9,755.7	10,087.3
North America total	9,967.2	9,866.4	9,945.5	10,236.9	10,607.7	10,961.9
Western Europe						
Austria	158.5	150.3	148.3	152.5	156.4	160.5
Belgium	229.0	217.8	214.8	220.9	227.8	233.7
Denmark	171.8	164.4	163.0	168.1	172.5	176.7
Finland	91.2	89.0	87.5	89.6	91.5	93.8
France	944.4	901.3	889.9	915.0	943.9	968.0
Germany	1,735.5	1,672.6	1,647.0	1,689.0	1,725.6	1,770.2
Greece	17.5	15.8	15.7	16.3	17.3	17.7
Ireland	100.1	97.8	97.7	101.3	104.8	108.1
Italy	697.5	664.9	656.8	676.2	700.1	717.9
Netherlands	301.8	290.4	288.0	297.4	309.1	317.2
Norway	98.8	93.5	92.8	95.7	97.9	100.5
Portugal	45.6	43.0	42.4	43.8	46.1	47.3
Spain	320.5	304.5	301.6	311.3	324.3	332.4
Sweden	197.1	190.1	188.3	194.0	198.6	203.5
Switzerland	351.1	331.4	328.8	339.6	352.0	361.1
United Kingdom	1,484.5	1,428.1	1,411.9	1,453.0	1,478.4	1,517.0
Western Europe total	6,945.0	6,655.0	6,574.5	6,763.4	6,946.4	7,125.5
Worldwide total	24,509.6	24,025.3	24,421.5	25,387.6	26,439.5	27,400.6

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 448

WORLDWIDE PRINTERS AND MFPS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	401.7	384.3	373.5	358.7	343.0	327.1
China	1,285.7	1,429.6	1,579.7	1,770.2	1,953.3	2,150.5
Hong Kong	104.9	97.3	95.7	95.8	95.9	94.8
India	222.2	245.7	273.3	319.4	371.4	413.5
Indonesia	102.9	100.3	108.1	122.3	127.8	130.9
Japan	4,792.6	5,341.8	5,607.5	5,911.1	6,148.2	6,494.2
Korea	566.0	551.9	557.7	564.3	562.8	557.5
Malaysia	122.2	122.8	132.7	143.3	147.7	151.4
New Zealand	57.6	50.5	49.3	49.9	49.6	49.5
Philippines	46.1	47.9	49.6	51.6	53.7	55.7
Singapore	81.2	85.6	87.8	88.7	89.1	90.1
Taiwan	203.2	211.9	222.3	228.4	228.7	224.4
Thailand	133.9	133.4	144.9	150.8	152.1	154.0
Vietnam	47.3	50.5	56.2	62.3	63.8	65.1
Rest of Asia/Pacific	80.7	84.5	92.7	101.4	103.9	106.0
AP Excluding Japan	3,455.3	3,596.1	3,823.6	4,107.2	4,342.8	4,570.5
Asia/Pacific total	8,247.9	8,937.8	9,431.1	10,018.3	10,491.0	11,064.7
Central and Eastern Europe						
Bulgaria	15.7	17.7	19.2	20.1	20.9	21.5
Croatia	31.5	32.9	34.8	35.5	36.0	37.1
Czech Republic	109.8	114.5	118.8	123.8	129.4	132.9
Hungary	81.0	86.7	89.2	92.2	95.0	96.2
Poland	208.5	210.7	220.7	237.2	253.6	264.5
Romania	44.7	51.6	53.8	55.5	59.4	62.6
Russia	537.3	574.6	632.3	674.2	690.0	719.5
Slovakia	35.0	38.1	40.8	43.7	45.7	46.7
Slovenia	27.6	28.7	29.7	29.4	30.4	30.9
Rest of Eastern Europe	189.3	203.8	220.4	240.1	249.1	259.7
Central and Eastern Europe total	1,280.4	1,359.3	1,459.9	1,551.7	1,609.5	1,671.6
Latin America						
Argentina	14.5	32.7	65.7	97.6	119.2	148.9
Brazil	405.7	368.5	402.9	431.8	457.6	478.9
Chile	75.8	58.3	63.2	68.8	70.2	75.1
Colombia	49.9	83.4	91.6	100.9	103.4	108.4
Mexico	375.8	373.8	388.3	413.5	448.9	490.1
Venezuela	31.8	33.1	34.1	34.7	36.9	39.1
Rest of Latin America	217.9	258.7	275.4	303.2	317.6	346.2
Latin America total	1,171.4	1,208.6	1,321.2	1,450.5	1,553.8	1,686.6

TABLE 448

WORLDWIDE PRINTERS AND MFPS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	61.3	64.1	64.9	67.3	67.9	71.9
Israel	89.1	89.1	92.7	97.2	100.1	104.9
Saudi Arabia	108.7	121.5	133.8	145.2	160.4	161.8
South Africa	163.7	165.5	167.9	171.7	175.5	180.7
Turkey	122.2	137.0	136.7	139.5	139.3	140.9
United Arab Emirates	65.1	68.3	72.4	76.3	82.8	85.8
Rest of Middle East/Africa	307.8	340.1	388.3	443.3	491.9	540.7
Middle East/Africa total	918.0	985.5	1,056.7	1,140.4	1,217.8	1,286.7
North America						
Canada	1,069.7	1,140.3	1,194.9	1,173.4	1,260.5	1,274.3
United States	16,901.9	16,800.0	16,526.9	16,317.1	16,268.4	16,201.8
North America total	17,971.6	17,940.3	17,721.8	17,490.4	17,529.0	17,476.1
Western Europe						
Austria	283.2	373.4	426.2	468.0	504.6	528.1
Belgium	394.2	421.6	466.8	506.1	540.9	555.1
Denmark	290.0	312.7	356.0	388.0	416.9	444.2
Finland	211.1	248.6	296.6	339.4	383.5	414.0
France	2,038.8	2,229.3	2,481.8	2,700.8	2,917.3	3,061.7
Germany	2,398.6	2,518.6	2,643.4	2,723.9	2,790.0	2,826.4
Greece	114.6	146.1	152.7	157.8	163.0	164.4
Ireland	104.2	116.6	132.6	147.4	162.6	171.6
Italy	1,255.4	1,376.8	1,472.7	1,562.9	1,637.0	1,701.3
Netherlands	539.3	605.1	670.5	729.4	786.3	814.5
Norway	239.5	320.7	362.6	384.8	392.2	385.4
Portugal	200.5	269.3	294.2	312.4	322.0	317.8
Spain	661.7	827.1	892.7	943.1	983.3	987.6
Sweden	371.1	410.4	479.8	540.8	604.4	650.3
Switzerland	433.4	490.5	559.6	609.4	654.0	685.1
United Kingdom	1,964.9	2,028.8	2,269.8	2,482.0	2,698.1	2,824.8
Western Europe total	11,500.3	12,695.5	13,957.9	14,996.2	15,956.1	16,532.3
Worldwide total	41,089.6	43,127.0	44,948.6	46,647.5	48,357.0	49,718.1

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 449

WORLDWIDE SMART HANDHELD DEVICES SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	59.9	81.8	90.0	92.4	106.2	133.0
China	481.6	655.2	945.8	1,189.2	1,405.4	1,538.2
Hong Kong	55.0	83.7	120.7	160.2	192.4	216.2
India	5.2	20.3	28.3	29.3	38.7	42.5
Indonesia	4.1	4.9	5.7	6.6	7.8	10.5
Japan	619.4	578.1	634.4	718.2	816.9	924.8
Korea	124.3	167.0	272.9	460.7	758.8	1,327.4
Malaysia	34.1	57.5	73.3	88.2	103.2	119.7
New Zealand	6.0	9.1	11.3	10.6	10.5	12.5
Philippines	2.9	3.9	4.5	6.4	7.2	8.0
Singapore	49.9	66.9	90.1	112.3	147.0	167.7
Taiwan	71.7	88.6	92.0	101.5	111.6	120.9
Thailand	30.9	45.6	74.0	108.9	141.9	181.0
Vietnam	1.2	1.6	2.0	2.3	2.7	3.0
Rest of Asia/Pacific	3.5	3.7	3.5	4.0	4.4	5.0
AP Excluding Japan	930.3	1,289.7	1,813.9	2,372.8	3,037.8	3,885.8
Asia/Pacific total	1,549.7	1,867.9	2,448.2	3,090.9	3,854.7	4,810.6
Central and Eastern Europe						
Bulgaria	1.4	1.7	1.9	2.2	2.5	2.8
Croatia	1.8	2.0	2.3	2.7	2.9	3.5
Czech Republic	8.4	10.2	12.4	13.3	15.3	16.9
Hungary	4.1	5.2	6.7	8.2	9.6	10.5
Poland	7.7	9.9	13.1	15.3	16.9	18.5
Romania	1.9	2.3	2.8	3.2	3.7	4.5
Russia	14.6	18.5	22.3	24.6	27.4	31.2
Slovakia	2.1	2.5	3.2	3.8	4.6	5.1
Slovenia	2.2	2.5	3.0	3.2	3.5	3.8
Rest of Eastern Europe	4.2	5.3	6.5	7.1	7.7	9.4
Central and Eastern Europe total	48.3	60.1	74.2	83.6	94.0	106.4
Latin America						
Argentina	5.5	8.7	10.9	12.8	15.4	17.0
Brazil	89.3	68.8	76.7	75.9	82.0	87.2
Chile	7.4	8.1	9.2	9.2	10.6	11.8
Colombia	13.3	12.5	14.0	15.2	17.5	19.8
Mexico	148.7	126.3	151.7	169.9	193.0	215.0
Venezuela	4.2	2.8	2.7	3.6	4.0	4.3
Rest of Latin America	19.8	21.0	23.1	24.8	27.3	29.7
Latin America total	288.2	248.0	288.3	311.5	349.8	384.7

TABLE 449

WORLDWIDE SMART HANDHELD DEVICES SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	3.6	4.3	5.2	5.9	6.2	6.8
Israel	9.4	11.2	14.6	16.5	18.8	19.7
Saudi Arabia	6.4	8.5	9.4	10.7	12.6	13.9
South Africa	6.2	8.3	10.0	10.9	12.0	12.7
Turkey	6.2	7.9	9.3	10.3	11.1	12.1
United Arab Emirates	4.7	6.0	7.1	8.2	8.8	9.3
Rest of Middle East/Africa	10.3	14.8	20.3	25.3	31.3	36.8
Middle East/Africa total	46.8	61.0	76.0	87.7	100.9	111.2
North America						
Canada	240.4	221.3	233.7	232.9	231.1	233.7
United States	2,750.1	3,914.3	5,014.2	6,891.1	9,244.4	12,193.7
North America total	2,990.5	4,135.6	5,247.9	7,124.0	9,475.5	12,427.3
Western Europe						
Austria	53.2	95.2	172.9	243.3	298.1	342.7
Belgium	61.5	123.3	234.2	317.6	379.2	432.1
Denmark	59.2	108.7	209.4	281.6	301.5	350.0
Finland	53.6	85.0	180.7	262.2	323.9	369.1
France	326.0	638.9	1,168.8	1,656.3	2,128.0	2,442.4
Germany	547.1	899.5	1,664.3	2,414.3	3,048.0	3,491.3
Greece	13.9	21.7	51.0	95.3	142.3	180.0
Ireland	18.2	28.7	59.6	101.0	136.5	157.9
Italy	244.7	522.2	1,062.1	1,643.8	2,262.9	2,682.7
Netherlands	124.6	196.0	343.8	500.1	623.0	708.9
Norway	36.7	61.7	114.7	165.8	219.4	251.1
Portugal	34.6	64.0	121.3	200.1	277.2	328.6
Spain	176.7	349.6	715.2	1,067.9	1,377.5	1,596.6
Sweden	78.8	111.5	211.6	337.2	435.6	499.6
Switzerland	111.0	199.3	370.8	524.4	397.1	434.0
United Kingdom	614.2	1,074.7	1,879.7	2,594.5	3,142.4	3,438.8
Western Europe total	2,554.0	4,580.1	8,560.0	12,405.6	15,492.5	17,705.7
Worldwide total	7,477.5	10,952.7	16,694.7	23,103.4	29,367.3	35,546.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 450

WORLDWIDE OTHER ADD-ONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	297.8	290.7	303.2	315.0	330.6	348.3
China	796.0	734.0	836.1	976.5	1,116.8	1,270.2
Hong Kong	77.1	69.8	76.0	84.1	92.0	99.4
India	149.8	156.8	198.4	257.3	336.0	406.3
Indonesia	47.9	46.8	50.1	54.8	60.8	66.5
Japan	1,256.0	1,054.5	1,080.7	1,077.2	1,045.7	1,056.0
Korea	398.8	369.2	416.6	458.8	497.4	533.5
Malaysia	69.6	63.9	68.3	75.5	84.9	93.8
New Zealand	42.9	36.3	39.5	42.8	47.4	52.2
Philippines	27.9	29.4	36.6	42.7	48.9	57.1
Singapore	78.6	72.5	78.2	82.8	89.2	96.1
Taiwan	131.1	126.3	140.0	154.5	170.6	187.7
Thailand	68.2	66.9	64.5	72.9	80.4	88.7
Vietnam	15.7	16.1	19.1	23.4	28.1	33.0
Rest of Asia/Pacific	32.8	32.8	42.4	56.4	72.1	90.2
AP Excluding Japan	2,234.1	2,111.6	2,369.0	2,697.5	3,055.0	3,423.0
Asia/Pacific total	3,490.1	3,166.1	3,449.7	3,774.6	4,100.7	4,479.0
Central and Eastern Europe						
Bulgaria	14.9	16.4	17.8	20.2	22.2	22.7
Croatia	16.6	18.5	20.5	22.7	25.0	28.3
Czech Republic	77.6	83.9	91.7	100.1	109.7	119.3
Hungary	59.5	64.9	70.3	75.7	81.8	88.0
Poland	85.8	92.3	99.7	107.8	120.1	129.1
Romania	17.2	19.9	22.4	25.5	29.0	33.9
Russia	121.0	132.3	144.5	157.8	180.4	201.4
Slovakia	23.8	26.2	28.9	31.8	34.7	38.5
Slovenia	16.5	18.2	19.7	20.9	23.7	26.2
Rest of Eastern Europe	108.6	131.5	153.7	180.6	204.8	228.2
Central and Eastern Europe total	541.4	604.0	669.1	743.2	831.5	915.7
Latin America						
Argentina	2.5	6.1	11.4	16.0	21.1	25.2
Brazil	54.0	55.1	64.5	72.5	81.4	89.0
Chile	6.7	7.0	8.2	9.3	10.6	11.8
Colombia	7.4	8.4	10.0	11.2	11.6	13.0
Mexico	49.3	49.5	58.8	67.9	78.4	89.7
Venezuela	4.2	2.3	2.8	3.5	4.3	4.8
Rest of Latin America	23.0	24.2	28.1	32.0	36.1	40.0
Latin America total	147.0	152.5	183.7	212.4	243.5	273.4

TABLE 450

WORLDWIDE OTHER ADD-ONS SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	27.4	30.6	36.9	38.6	39.9	44.6
Israel	69.9	75.6	83.6	93.0	104.7	119.4
Saudi Arabia	52.6	60.6	69.4	80.5	86.6	96.0
South Africa	243.4	256.4	269.6	283.4	299.8	316.0
Turkey	51.8	43.4	79.6	113.2	141.4	164.5
United Arab Emirates	27.3	32.4	39.2	44.5	48.1	51.5
Rest of Middle East/Africa	125.6	151.6	186.1	227.9	270.9	319.9
Middle East/Africa total	598.1	650.5	764.4	881.1	991.3	1,112.0
North America						
Canada	641.7	672.5	701.4	732.3	765.2	798.9
United States	4,126.6	3,434.4	3,220.9	3,014.4	3,180.7	2,884.4
North America total	4,768.3	4,106.8	3,922.3	3,746.7	3,945.9	3,683.3
Western Europe						
Austria	67.2	64.2	61.2	61.1	60.5	61.7
Belgium	85.2	77.7	73.6	72.6	70.0	68.8
Denmark	66.5	65.2	61.6	56.3	51.7	47.9
Finland	52.9	49.1	45.4	43.7	40.9	38.8
France	501.4	473.2	456.8	451.5	432.7	432.6
Germany	692.9	616.8	562.0	545.4	517.0	518.1
Greece	29.1	27.4	26.6	26.5	27.7	28.5
Ireland	33.0	27.6	25.2	25.6	25.3	25.6
Italy	297.6	288.3	290.1	305.1	302.7	307.8
Netherlands	179.1	161.1	148.3	146.8	146.1	143.4
Norway	61.4	63.1	59.3	58.2	57.3	57.5
Portugal	44.0	42.2	43.2	43.9	45.1	45.3
Spain	187.6	182.4	178.4	184.2	184.9	190.2
Sweden	137.8	112.5	99.9	95.1	91.8	91.9
Switzerland	114.2	103.9	99.3	98.8	97.9	94.8
United Kingdom	618.5	541.4	508.8	488.5	469.8	473.0
Western Europe total	3,168.5	2,896.0	2,739.6	2,703.3	2,621.4	2,625.8
Worldwide total	12,713.4	11,576.0	11,728.9	12,061.3	12,734.5	13,089.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 451

WORLDWIDE PERIPHERALS TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	759.4	756.8	766.8	766.1	779.8	808.5
China	2,563.3	2,818.8	3,361.5	3,935.9	4,475.5	4,958.9
Hong Kong	237.0	250.7	292.5	340.2	380.2	410.4
India	377.1	422.8	500.0	606.0	746.1	862.4
Indonesia	154.9	152.0	163.8	183.7	196.3	207.9
Japan	6,667.9	6,974.4	7,322.6	7,706.4	8,010.9	8,475.1
Korea	1,089.0	1,088.2	1,247.2	1,483.8	1,819.0	2,418.4
Malaysia	226.0	244.2	274.3	307.0	335.8	365.0
New Zealand	106.4	95.9	100.1	103.3	107.5	114.1
Philippines	76.8	81.2	90.7	100.7	109.7	120.8
Singapore	209.7	225.0	256.1	283.9	325.3	353.9
Taiwan	406.0	426.9	454.2	484.4	510.9	533.1
Thailand	233.1	245.8	283.3	332.7	374.5	423.8
Vietnam	64.1	68.2	77.3	88.0	94.6	101.1
Rest of Asia/Pacific	116.9	121.0	138.6	161.9	180.3	201.2
AP Excluding Japan	6,619.7	6,997.4	8,006.4	9,177.5	10,435.5	11,879.3
Asia/Pacific total	13,287.7	13,971.8	15,329.0	16,883.9	18,446.4	20,354.3
Central and Eastern Europe						
Bulgaria	31.9	35.8	38.8	42.5	45.5	47.0
Croatia	49.9	53.4	57.7	60.8	63.9	68.8
Czech Republic	195.8	208.6	222.9	237.3	254.4	269.1
Hungary	144.7	156.8	166.3	176.1	186.4	194.8
Poland	302.0	312.9	333.5	360.3	390.6	412.2
Romania	63.8	73.8	79.1	84.2	92.1	101.0
Russia	672.9	725.3	799.1	856.6	897.8	952.1
Slovakia	60.9	66.8	72.8	79.3	85.0	90.3
Slovenia	46.3	49.4	52.4	53.6	57.6	61.0
Rest of Eastern Europe	302.1	340.5	380.6	427.8	461.6	497.3
Central and Eastern Europe total	1,870.1	2,023.4	2,203.2	2,378.5	2,535.0	2,693.6
Latin America						
Argentina	22.5	47.5	88.0	126.4	155.7	191.1
Brazil	549.0	492.3	544.1	580.1	621.0	655.1
Chile	89.9	73.4	80.5	87.4	91.3	98.6
Colombia	70.6	104.2	115.6	127.4	132.5	141.2
Mexico	573.8	549.6	598.8	651.3	720.3	794.8
Venezuela	40.1	38.2	39.6	41.8	45.3	48.2
Rest of Latin America	260.7	303.9	326.5	360.0	381.0	415.9
Latin America total	1,606.6	1,609.1	1,793.2	1,974.4	2,147.1	2,344.8

TABLE 451

WORLDWIDE PERIPHERALS TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	92.3	99.0	107.0	111.8	114.1	123.3
Israel	168.5	175.9	190.8	206.7	223.5	244.0
Saudi Arabia	167.7	190.6	212.6	236.4	259.6	271.7
South Africa	413.4	430.2	447.5	465.9	487.2	509.3
Turkey	180.3	188.3	225.6	262.9	291.8	317.5
United Arab Emirates	97.0	106.8	118.7	128.9	139.7	146.6
Rest of Middle East/Africa	443.7	506.5	594.8	696.5	794.1	897.4
Middle East/Africa total	1,562.9	1,697.1	1,897.1	2,109.2	2,310.0	2,509.9
North America						
Canada	1,951.7	2,034.1	2,130.0	2,138.5	2,256.8	2,306.8
United States	23,778.7	24,148.6	24,762.0	26,222.7	28,693.5	31,279.9
North America total	25,730.4	26,182.7	26,892.0	28,361.2	30,950.4	33,586.7
Western Europe						
Austria	403.6	532.8	660.3	772.5	863.1	932.5
Belgium	540.9	622.6	774.5	896.3	990.0	1,056.0
Denmark	415.7	486.7	627.0	725.9	770.1	842.2
Finland	317.6	382.7	522.6	645.3	748.3	821.9
France	2,866.2	3,341.4	4,107.3	4,808.6	5,478.0	5,936.8
Germany	3,638.6	4,034.9	4,869.7	5,683.7	6,355.0	6,835.7
Greece	157.5	195.2	230.3	279.6	332.9	372.8
Ireland	155.3	172.9	217.5	274.0	324.4	355.0
Italy	1,797.7	2,187.2	2,824.9	3,511.8	4,202.6	4,691.8
Netherlands	843.1	962.2	1,162.6	1,376.3	1,555.3	1,666.8
Norway	337.6	445.5	536.6	608.8	668.9	694.0
Portugal	279.0	375.5	458.7	556.4	644.3	691.8
Spain	1,026.0	1,359.1	1,786.3	2,195.2	2,545.7	2,774.5
Sweden	587.7	634.4	791.3	973.0	1,131.8	1,241.8
Switzerland	658.6	793.7	1,029.7	1,232.7	1,149.0	1,213.8
United Kingdom	3,197.6	3,644.9	4,658.3	5,565.0	6,310.3	6,736.6
Western Europe total	17,222.7	20,171.6	25,257.6	30,105.1	34,069.9	36,863.8
Worldwide total	61,280.4	65,655.7	73,372.1	81,812.2	90,458.7	98,353.2

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 452

WORLDWIDE NETWORKING EQUIPMENT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	619.4	583.5	631.8	663.1	719.7	788.6
China	2,462.0	2,597.5	2,726.8	3,028.4	3,647.3	4,034.1
Hong Kong	260.9	259.4	289.2	307.7	329.2	345.4
India	344.5	402.9	493.2	630.8	831.0	1,052.9
Indonesia	68.5	68.3	76.0	87.9	102.3	114.0
Japan	3,944.6	3,608.9	3,779.6	4,070.7	4,220.6	4,530.8
Korea	1,036.3	937.1	997.1	1,079.5	1,207.9	1,331.2
Malaysia	145.3	158.4	174.0	202.5	236.2	268.6
New Zealand	118.7	102.3	103.9	110.0	118.3	126.8
Philippines	62.3	67.6	76.9	89.1	104.1	117.9
Singapore	218.1	213.9	240.5	266.6	291.2	311.3
Taiwan	360.2	350.8	364.1	412.8	486.4	527.8
Thailand	100.6	110.2	132.0	156.2	186.5	208.2
Vietnam	39.5	37.4	40.4	45.4	50.7	56.1
Rest of Asia/Pacific	64.3	61.2	65.6	74.4	86.0	99.0
AP Excluding Japan	5,900.5	5,950.6	6,411.4	7,154.5	8,396.8	9,382.1
Asia/Pacific total	9,845.1	9,559.4	10,191.1	11,225.3	12,617.3	13,912.8
Central and Eastern Europe						
Bulgaria	16.4	17.9	19.0	20.6	22.3	24.4
Croatia	23.2	25.8	29.1	32.0	35.2	39.4
Czech Republic	175.1	186.3	196.5	211.3	229.6	253.5
Hungary	97.2	106.6	117.4	128.5	141.8	155.3
Poland	231.7	248.0	266.5	286.1	307.1	341.6
Romania	21.7	24.9	28.3	32.0	36.2	40.3
Russia	379.6	417.6	458.2	499.6	545.1	613.1
Slovakia	40.1	43.8	47.8	52.1	56.7	63.6
Slovenia	34.2	36.1	38.2	40.2	42.7	47.6
Rest of Eastern Europe	185.9	204.4	222.9	247.9	279.4	309.0
Central and Eastern Europe total	1,205.2	1,311.5	1,423.9	1,550.3	1,696.1	1,887.7
Latin America						
Argentina	62.8	86.6	123.5	151.5	176.2	210.3
Brazil	722.1	740.2	768.6	794.8	834.2	905.7
Chile	74.2	76.7	78.8	81.0	85.3	92.5
Colombia	100.3	103.4	104.6	108.8	115.3	126.0
Mexico	464.3	476.3	495.0	513.4	535.5	582.8
Venezuela	72.2	51.9	63.0	74.6	83.0	97.0
Rest of Latin America	187.6	195.3	201.3	210.5	222.2	243.3
Latin America total	1,683.5	1,730.4	1,834.9	1,934.5	2,051.7	2,257.6

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TABLE 452

WORLDWIDE NETWORKING EQUIPMENT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	65.6	68.2	74.3	87.9	96.5	102.4
Israel	213.1	216.1	230.0	251.0	265.6	272.3
Saudi Arabia	119.2	142.3	169.6	197.5	226.2	239.9
South Africa	248.5	264.4	284.0	300.5	315.5	331.1
Turkey	227.9	252.1	359.7	416.4	486.4	555.9
United Arab Emirates	70.5	83.3	101.8	117.8	133.1	142.5
Rest of Middle East/Africa	243.9	302.9	378.9	448.4	539.1	635.0
Middle East/Africa total	1,188.7	1,329.3	1,598.2	1,819.5	2,062.3	2,279.1
North America						
Canada	957.5	967.1	996.1	1,036.0	1,098.1	1,153.0
United States	22,921.0	21,920.0	22,753.5	24,157.9	26,190.9	28,634.8
North America total	23,878.5	22,887.1	23,749.6	25,193.8	27,289.0	29,787.9
Western Europe						
Austria	259.8	265.5	276.1	303.8	336.7	365.9
Belgium	394.7	377.6	383.6	417.7	468.0	507.4
Denmark	436.7	422.7	440.9	477.5	487.7	533.2
Finland	299.9	307.4	337.5	378.7	393.2	434.1
France	1,512.5	1,470.1	1,532.0	1,750.8	2,004.1	2,161.8
Germany	2,802.8	2,772.6	2,945.7	3,229.4	3,533.5	3,796.2
Greece	99.0	112.8	134.0	167.9	218.4	262.3
Ireland	144.5	151.9	163.6	182.0	198.5	225.9
Italy	1,062.9	1,105.2	1,188.2	1,319.6	1,509.3	1,631.7
Netherlands	707.9	710.7	729.4	791.7	880.3	963.2
Norway	326.7	329.4	357.3	395.5	414.7	463.7
Portugal	158.7	169.5	184.2	219.6	268.5	305.2
Spain	754.5	774.3	804.6	891.3	1,044.2	1,161.3
Sweden	612.1	615.5	639.6	690.4	718.0	771.9
Switzerland	479.0	454.3	460.4	485.5	520.0	552.0
United Kingdom	2,582.7	2,611.3	2,742.1	2,998.6	3,237.6	3,456.1
Western Europe total	12,634.3	12,650.7	13,319.1	14,700.0	16,232.9	17,591.9
Worldwide total	50,435.3	49,468.4	52,116.8	56,423.4	61,949.3	67,716.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 453

WORLDWIDE HARDWARE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	5,492.5	5,630.8	5,694.6	5,713.0	5,733.6	5,791.8
China	16,723.5	17,359.8	19,411.5	22,312.5	25,439.3	28,522.7
Hong Kong	1,598.6	1,525.1	1,618.5	1,737.3	1,844.6	1,925.7
India	2,891.9	3,306.6	4,003.4	5,070.2	6,574.7	7,931.7
Indonesia	894.6	931.1	979.7	1,066.5	1,164.9	1,258.4
Japan	40,514.3	38,873.2	39,792.8	40,696.8	41,461.6	42,336.9
Korea	7,629.1	7,187.5	7,830.3	8,546.7	9,349.5	10,316.6
Malaysia	1,403.6	1,439.2	1,524.8	1,680.3	1,869.7	2,055.2
New Zealand	831.2	744.9	777.4	809.9	845.7	884.5
Philippines	538.8	590.8	710.8	816.1	906.0	1,029.2
Singapore	1,473.2	1,413.6	1,489.1	1,537.6	1,601.3	1,651.9
Taiwan	2,671.1	2,738.8	2,909.3	3,157.1	3,460.1	3,739.3
Thailand	1,272.7	1,352.7	1,318.6	1,473.7	1,618.4	1,777.4
Vietnam	344.2	382.7	441.9	522.8	610.5	702.1
Rest of Asia/Pacific	616.6	632.8	756.8	960.1	1,193.4	1,471.3
AP Excluding Japan	44,381.5	45,236.5	49,466.6	55,403.9	62,211.7	69,058.0
Asia/Pacific total	84,895.8	84,109.6	89,259.5	96,100.6	103,673.3	111,394.8
Central and Eastern Europe						
Bulgaria	140.2	154.6	173.2	189.9	209.4	226.8
Croatia	268.5	287.7	300.7	322.5	346.2	377.8
Czech Republic	988.2	1,001.3	1,041.5	1,130.1	1,207.7	1,280.3
Hungary	662.3	720.4	799.8	863.5	915.7	963.6
Poland	1,690.6	1,844.3	2,087.3	2,235.5	2,442.7	2,647.0
Romania	322.4	348.6	360.6	391.3	435.8	480.3
Russia	3,096.8	3,240.4	3,677.6	4,126.7	4,555.8	5,080.1
Slovakia	301.4	314.5	329.0	361.3	395.0	424.9
Slovenia	239.8	259.0	284.5	303.6	327.6	342.5
Rest of Eastern Europe	1,406.7	1,581.7	1,757.2	2,006.0	2,279.1	2,512.2
Central and Eastern Europe total	9,116.9	9,752.5	10,811.3	11,930.4	13,115.1	14,335.4
Latin America						
Argentina	277.6	547.8	866.5	1,092.1	1,292.6	1,456.4
Brazil	5,022.4	4,798.0	4,973.9	5,137.3	5,300.6	5,468.7
Chile	559.3	548.6	568.4	590.3	615.5	642.3
Colombia	654.3	689.2	727.1	754.4	738.9	781.0
Mexico	4,000.7	3,836.1	4,033.2	4,265.6	4,492.3	4,789.7
Venezuela	462.3	264.0	295.6	351.5	396.6	435.1
Rest of Latin America	1,885.1	1,879.4	1,941.2	2,035.7	2,116.6	2,212.2
Latin America total	12,861.8	12,563.1	13,405.8	14,227.0	14,953.1	15,785.3

TABLE 453

WORLDWIDE HARDWARE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	342.6	398.5	435.8	469.3	502.9	543.9
Israel	1,323.7	1,280.8	1,352.3	1,445.8	1,543.6	1,627.4
Saudi Arabia	783.4	850.0	980.2	1,153.1	1,312.9	1,437.9
South Africa	1,793.2	1,856.2	1,993.5	2,093.7	2,176.5	2,237.2
Turkey	940.9	1,091.0	1,414.3	1,701.3	2,019.4	2,392.4
United Arab Emirates	522.3	592.1	638.2	677.2	713.9	748.3
Rest of Middle East/Africa	2,307.1	2,591.2	3,002.2	3,410.9	3,879.9	4,369.5
Middle East/Africa total	8,013.2	8,659.7	9,816.4	10,951.3	12,149.2	13,356.6
North America						
Canada	8,707.5	8,479.1	8,408.2	8,424.4	8,583.8	8,651.1
United States	125,313.0	119,609.9	122,698.1	126,817.5	130,792.5	134,443.4
North America total	134,020.4	128,089.1	131,106.3	135,241.9	139,376.3	143,094.5
Western Europe						
Austria	2,110.3	2,132.4	2,234.7	2,416.2	2,571.2	2,723.5
Belgium	2,658.5	2,593.0	2,690.4	2,884.3	3,040.5	3,170.5
Denmark	2,218.8	2,242.7	2,417.7	2,541.5	2,594.8	2,711.6
Finland	1,701.4	1,665.4	1,789.1	1,954.7	2,062.0	2,170.0
France	13,886.1	13,552.3	14,163.0	15,267.6	16,184.0	17,005.2
Germany	21,244.7	19,957.1	20,389.7	21,746.9	22,628.7	23,739.9
Greece	816.7	849.8	907.3	1,006.4	1,150.7	1,265.0
Ireland	1,017.1	977.5	1,032.4	1,131.0	1,210.3	1,287.0
Italy	8,837.8	9,281.2	10,138.3	11,422.7	12,579.1	13,543.3
Netherlands	4,742.2	4,594.0	4,659.1	5,023.4	5,389.9	5,641.3
Norway	1,784.7	1,870.8	1,963.1	2,092.3	2,193.7	2,303.6
Portugal	1,185.1	1,212.5	1,292.4	1,452.6	1,623.0	1,726.8
Spain	5,067.3	5,714.0	6,303.1	7,024.7	7,711.3	8,294.3
Sweden	3,601.6	3,227.3	3,334.2	3,561.9	3,761.3	3,982.1
Switzerland	3,553.6	3,576.4	3,839.9	4,156.6	4,194.1	4,327.9
United Kingdom	18,913.9	18,464.8	19,604.2	20,832.6	21,860.4	22,914.1
Western Europe total	93,339.8	91,911.2	96,758.6	104,515.4	110,754.9	116,806.2
Worldwide total	342,247.9	335,085.3	351,157.8	372,966.6	394,021.9	414,772.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 454

WORLDWIDE PACKAGED SOFTWARE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	2,295.6	2,206.7	2,314.2	2,477.6	2,675.2	2,879.6
China	2,084.4	2,563.3	3,241.6	4,104.7	5,115.1	6,294.9
Hong Kong	323.5	317.7	332.8	353.7	382.1	415.0
India	456.8	529.5	637.1	766.7	938.3	1,131.4
Indonesia	100.5	101.7	112.8	123.6	136.4	147.8
Japan	14,515.8	14,977.8	15,742.7	16,636.0	17,667.8	18,707.1
Korea	1,673.2	1,719.9	1,858.6	2,070.4	2,295.8	2,544.5
Malaysia	362.5	380.9	404.8	433.0	468.6	506.2
New Zealand	286.7	242.6	252.2	267.3	284.9	305.4
Philippines	102.6	114.7	123.8	135.7	148.5	162.4
Singapore	488.5	475.5	508.8	546.0	593.9	650.7
Taiwan	563.0	562.5	594.6	633.1	682.0	735.2
Thailand	151.0	159.6	174.6	191.7	212.6	234.2
Vietnam	13.2	14.2	15.5	17.2	19.1	21.3
Rest of Asia/Pacific	41.6	43.6	46.5	50.6	55.2	60.9
AP Excluding Japan	8,943.1	9,432.5	10,617.9	12,171.3	14,007.8	16,089.6
Asia/Pacific total	23,458.9	24,410.3	26,360.5	28,807.3	31,675.6	34,796.7
Central and Eastern Europe						
Bulgaria	37.0	43.3	49.4	56.4	64.0	70.1
Croatia	87.4	99.1	110.8	123.4	137.0	153.9
Czech Republic	418.1	476.7	542.1	614.4	692.1	757.0
Hungary	368.8	414.9	459.3	507.8	558.8	615.8
Poland	587.1	672.1	766.2	871.1	987.4	1,083.8
Romania	65.6	74.9	82.0	91.7	104.8	119.1
Russia	606.1	739.0	865.0	978.0	1,075.0	1,174.0
Slovakia	113.7	127.5	141.3	156.2	173.8	191.4
Slovenia	81.6	92.6	104.7	115.5	129.9	141.1
Rest of Eastern Europe	286.2	331.4	379.0	431.7	476.2	532.2
Central and Eastern Europe total	2,651.6	3,071.5	3,499.8	3,946.2	4,399.0	4,838.4
Latin America						
Argentina	172.9	223.5	301.2	366.1	434.8	459.0
Brazil	1,730.1	1,846.9	1,987.6	2,133.1	2,282.0	2,434.6
Chile	127.7	134.6	144.5	155.9	167.0	175.0
Colombia	182.1	194.6	212.8	237.3	259.2	272.8
Mexico	681.5	704.0	735.3	771.7	801.8	860.5
Venezuela	151.5	106.8	130.5	177.1	215.5	238.4
Rest of Latin America	229.5	239.4	261.2	289.1	320.2	342.3
Latin America total	3,275.5	3,449.8	3,773.1	4,130.2	4,480.4	4,782.6

TABLE 454

WORLDWIDE PACKAGED SOFTWARE TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	97.2	102.0	115.2	131.6	155.5	175.7
Israel	578.0	583.0	603.0	634.0	673.0	709.5
Saudi Arabia	329.9	365.6	405.6	448.3	497.3	545.1
South Africa	894.5	1,018.7	1,157.4	1,314.4	1,476.0	1,718.4
Turkey	214.9	239.3	316.4	390.5	418.9	458.4
United Arab Emirates	144.1	157.6	177.7	200.0	223.7	243.0
Rest of Middle East/Africa	406.9	455.2	526.3	621.7	719.6	832.8
Middle East/Africa total	2,665.4	2,921.4	3,301.6	3,740.4	4,164.0	4,682.8
North America						
Canada	3,827.5	3,866.4	3,953.9	4,080.2	4,205.8	4,328.9
United States	81,796.8	83,764.6	87,514.5	93,362.8	100,430.4	106,913.4
North America total	85,624.4	87,631.0	91,468.4	97,443.0	104,636.3	111,242.3
Western Europe						
Austria	1,169.0	1,191.8	1,246.8	1,325.6	1,424.4	1,528.4
Belgium	1,676.9	1,724.2	1,806.5	1,923.7	2,066.4	2,216.8
Denmark	1,176.6	1,210.5	1,277.9	1,364.8	1,459.9	1,559.7
Finland	836.7	866.2	916.4	978.5	1,051.6	1,128.9
France	8,895.8	9,134.7	9,584.9	10,252.9	10,994.7	11,787.7
Germany	12,054.0	12,439.7	13,172.4	14,069.9	15,139.0	16,241.9
Greece	269.0	277.6	292.6	317.8	342.6	369.9
Ireland	382.2	387.9	407.8	429.2	461.3	495.0
Italy	3,975.6	4,090.9	4,272.0	4,562.6	4,922.9	5,284.4
Netherlands	3,788.7	3,880.4	4,072.8	4,344.5	4,669.2	5,011.7
Norway	821.6	845.3	905.3	979.1	1,058.5	1,136.3
Portugal	380.2	391.5	413.4	450.5	487.6	523.4
Spain	1,940.9	2,002.8	2,110.7	2,265.9	2,434.8	2,612.3
Sweden	1,868.6	1,932.8	2,053.8	2,193.3	2,350.2	2,515.2
Switzerland	2,073.4	2,108.0	2,215.5	2,365.5	2,521.0	2,704.6
United Kingdom	11,823.4	12,199.8	12,725.2	13,559.9	14,555.1	15,640.0
Western Europe total	53,132.6	54,684.0	57,474.1	61,383.7	65,939.2	70,756.2
Worldwide total	170,808.2	176,167.9	185,877.5	199,450.8	215,294.5	231,099.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 455

WORLDWIDE SERVICES TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	5,475.0	5,652.2	6,005.4	6,486.4	7,062.0	7,727.7
China	3,675.7	4,382.7	5,612.4	7,122.1	8,948.9	11,057.4
Hong Kong	652.6	631.3	635.0	638.8	642.5	648.0
India	1,287.4	1,457.5	1,680.9	1,913.8	2,164.8	2,409.2
Indonesia	171.6	189.8	211.7	240.9	277.6	323.0
Japan	34,770.0	34,905.9	35,899.9	37,208.3	38,898.5	40,920.7
Korea	3,196.7	3,484.1	3,939.4	4,469.6	5,048.4	5,656.9
Malaysia	403.7	442.9	515.4	618.7	760.1	945.9
New Zealand	859.6	917.7	973.6	1,032.3	1,094.3	1,153.8
Philippines	318.8	345.7	371.3	398.4	425.9	453.8
Singapore	1,078.8	1,105.3	1,139.5	1,180.5	1,228.9	1,281.2
Taiwan	1,286.1	1,326.2	1,372.5	1,416.7	1,465.1	1,519.6
Thailand	289.2	338.0	392.5	447.2	508.1	573.1
Vietnam	35.9	44.4	53.3	62.3	72.2	83.1
Rest of Asia/Pacific	250.1	289.8	339.8	399.2	459.4	523.5
AP Excluding Japan	18,981.1	20,607.6	23,243.0	26,427.0	30,158.2	34,356.0
Asia/Pacific total	53,751.1	55,513.5	59,142.9	63,635.3	69,056.7	75,276.7
Central and Eastern Europe						
Bulgaria	51.2	57.7	65.1	73.6	82.8	93.3
Croatia	106.8	123.9	143.9	164.3	184.3	206.8
Czech Republic	767.9	840.0	922.5	1,028.7	1,149.7	1,288.3
Hungary	529.0	567.0	632.0	701.0	782.0	873.0
Poland	819.8	919.7	1,037.8	1,163.4	1,306.6	1,461.3
Romania	111.2	133.0	143.1	164.6	195.8	247.9
Russia	1,174.2	1,391.8	1,616.3	1,971.5	2,400.7	2,898.2
Slovakia	175.6	203.8	232.8	264.4	288.7	315.2
Slovenia	91.2	99.8	107.2	117.7	128.9	141.3
Rest of Eastern Europe	340.9	398.8	462.9	543.2	617.0	690.3
Central and Eastern Europe total	4,167.8	4,735.5	5,363.6	6,192.2	7,136.5	8,215.5
Latin America						
Argentina	460.7	548.6	727.4	930.8	1,138.7	1,374.3
Brazil	3,062.6	2,760.6	3,000.7	3,283.0	3,578.8	3,914.6
Chile	384.6	403.8	433.9	466.6	505.4	549.6
Colombia	532.5	603.9	680.0	762.9	849.7	943.1
Mexico	1,876.7	1,965.2	2,133.3	2,333.5	2,551.4	2,768.6
Venezuela	437.4	283.9	320.5	369.0	418.3	473.8
Rest of Latin America	504.2	518.1	526.4	567.2	631.7	666.0
Latin America total	7,258.7	7,084.2	7,822.2	8,713.0	9,674.1	10,690.0

TABLE 455

WORLDWIDE SERVICES TOTAL SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	125.2	133.6	157.3	185.1	213.0	242.0
Israel	1,240.4	1,216.0	1,274.0	1,358.5	1,432.8	1,495.7
Saudi Arabia	660.6	705.4	783.4	884.6	1,000.6	1,122.0
South Africa	1,583.1	1,802.3	2,050.5	2,303.6	2,561.1	2,835.8
Turkey	403.5	479.5	612.2	778.4	868.8	988.0
United Arab Emirates	198.6	215.2	238.6	269.3	304.4	337.5
Rest of Middle East/Africa	758.9	887.8	1,048.0	1,243.1	1,451.3	1,705.3
Middle East/Africa total	4,970.3	5,439.8	6,164.0	7,022.6	7,831.9	8,726.4
North America						
Canada	10,151.0	10,289.6	10,703.4	11,131.4	11,622.1	12,142.3
United States	159,383.3	162,899.4	170,386.1	180,816.1	193,266.8	206,057.6
North America total	169,534.4	173,189.0	181,089.5	191,947.6	204,888.9	218,199.9
Western Europe						
Austria	2,510.0	2,645.5	2,833.0	3,037.9	3,251.1	3,465.2
Belgium	3,030.2	3,096.6	3,218.7	3,406.6	3,657.1	3,900.7
Denmark	2,691.7	2,770.8	2,891.7	3,028.7	3,170.5	3,306.4
Finland	1,684.1	1,743.2	1,802.0	1,894.6	2,039.1	2,198.6
France	21,751.7	21,733.8	21,945.0	22,715.8	24,046.4	25,543.4
Germany	22,208.5	22,072.1	22,156.1	22,706.1	23,922.3	25,227.5
Greece	495.1	543.8	601.2	657.5	709.9	758.5
Ireland	616.0	643.0	674.7	726.9	788.0	843.7
Italy	9,127.0	9,223.6	9,336.0	9,683.8	10,257.8	10,798.6
Netherlands	5,498.4	5,596.2	5,736.8	6,033.9	6,388.1	6,740.1
Norway	1,694.3	1,695.3	1,719.6	1,774.2	1,900.6	2,039.7
Portugal	658.0	712.2	766.4	836.1	922.6	997.9
Spain	4,150.0	4,439.0	4,740.3	5,174.4	5,734.4	6,257.4
Sweden	4,139.9	4,183.2	4,263.5	4,440.6	4,757.0	5,105.2
Switzerland	4,025.3	4,067.9	4,178.8	4,378.8	4,686.3	5,003.8
United Kingdom	26,121.1	26,454.3	26,847.5	27,962.6	29,742.3	31,515.7
Western Europe total	110,401.3	111,620.6	113,711.5	118,458.6	125,973.5	133,702.4
Worldwide total	350,083.7	357,582.5	373,293.5	395,969.4	424,561.7	454,811.0

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

TABLE 456

WORLDWIDE TOTAL IT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Asia/Pacific						
Australia	13,263.2	13,489.7	14,014.2	14,676.9	15,470.8	16,399.2
China	22,483.6	24,305.7	28,265.6	33,539.3	39,503.3	45,875.0
Hong Kong	2,574.6	2,474.1	2,586.3	2,729.8	2,869.2	2,988.7
India	4,636.0	5,293.6	6,321.4	7,750.7	9,677.8	11,472.4
Indonesia	1,166.7	1,222.6	1,304.3	1,431.0	1,578.9	1,729.2
Japan	89,800.1	88,756.9	91,435.5	94,541.0	98,028.0	101,964.7
Korea	12,499.0	12,391.6	13,628.3	15,086.6	16,693.7	18,518.0
Malaysia	2,169.8	2,263.1	2,445.0	2,732.0	3,098.4	3,507.3
New Zealand	1,977.5	1,905.1	2,003.2	2,109.6	2,224.8	2,343.7
Philippines	960.2	1,051.3	1,205.9	1,350.3	1,480.4	1,645.4
Singapore	3,040.4	2,994.3	3,137.4	3,264.2	3,424.2	3,583.8
Taiwan	4,520.2	4,627.6	4,876.4	5,207.0	5,607.2	5,994.1
Thailand	1,712.9	1,850.3	1,885.7	2,112.7	2,339.2	2,584.6
Vietnam	393.3	441.3	510.8	602.3	701.8	806.5
Rest of Asia/Pacific	908.3	966.3	1,143.1	1,409.9	1,708.0	2,055.7
AP Excluding Japan	72,305.7	75,276.5	83,327.5	94,002.2	106,377.7	119,503.6
Asia/Pacific total	162,105.9	164,033.4	174,762.9	188,543.2	204,405.6	221,468.3
Central and Eastern Europe						
Bulgaria	228.4	255.6	287.7	319.9	356.3	390.1
Croatia	462.8	510.7	555.3	610.1	667.5	738.5
Czech Republic	2,174.1	2,318.0	2,506.1	2,773.1	3,049.5	3,325.6
Hungary	1,560.1	1,702.3	1,891.0	2,072.3	2,256.5	2,452.4
Poland	3,097.4	3,436.1	3,891.2	4,270.0	4,736.7	5,192.1
Romania	499.2	556.6	585.7	647.6	736.4	847.2
Russia	4,877.1	5,371.2	6,158.9	7,076.2	8,031.5	9,152.3
Slovakia	590.7	645.8	703.1	781.9	857.5	931.5
Slovenia	412.6	451.4	496.5	536.8	586.4	624.9
Rest of Eastern Europe	2,033.8	2,311.8	2,599.0	2,980.9	3,372.3	3,734.7
Central and Eastern Europe total	15,936.3	17,559.5	19,674.6	22,068.8	24,650.6	27,389.3
Latin America						
Argentina	911.3	1,320.0	1,895.0	2,389.0	2,866.1	3,289.7
Brazil	9,815.1	9,405.6	9,962.2	10,553.4	11,161.4	11,818.0
Chile	1,071.6	1,087.0	1,146.8	1,212.8	1,287.9	1,366.9
Colombia	1,369.0	1,487.7	1,619.9	1,754.6	1,847.7	1,996.9
Mexico	6,558.9	6,505.4	6,901.8	7,370.8	7,845.5	8,418.7
Venezuela	1,051.3	654.6	746.6	897.6	1,030.4	1,147.2
Rest of Latin America	2,618.8	2,636.9	2,728.8	2,892.1	3,068.5	3,220.5
Latin America total	23,396.0	23,097.1	25,001.0	27,070.3	29,107.5	31,257.9

TABLE 456

WORLDWIDE TOTAL IT SPENDING BY COUNTRY, 2002–2007 ($M)

	2002	2003	2004	2005	2006	2007
Middle East/Africa						
Egypt	565.0	634.2	708.3	785.9	871.4	961.6
Israel	3,142.0	3,079.9	3,229.2	3,438.3	3,649.4	3,832.6
Saudi Arabia	1,773.9	1,920.9	2,169.1	2,486.0	2,810.8	3,105.0
South Africa	4,270.7	4,677.1	5,201.4	5,711.7	6,213.6	6,791.3
Turkey	1,559.3	1,809.8	2,342.9	2,870.2	3,307.1	3,838.7
United Arab Emirates	865.0	964.8	1,054.5	1,146.5	1,242.1	1,328.9
Rest of Middle East/Africa	3,472.9	3,934.1	4,576.5	5,275.8	6,050.8	6,907.6
Middle East/Africa total	15,648.9	17,020.8	19,282.0	21,714.4	24,145.2	26,765.8
North America						
Canada	22,686.0	22,635.1	23,065.4	23,636.0	24,411.8	25,122.4
United States	366,493.1	366,273.9	380,598.8	400,996.4	424,489.7	447,414.4
North America total	389,179.1	388,909.0	403,664.2	424,632.4	448,901.5	472,536.7
Western Europe						
Austria	5,789.3	5,969.7	6,314.5	6,779.7	7,246.7	7,717.1
Belgium	7,365.5	7,413.7	7,715.6	8,214.6	8,764.0	9,288.0
Denmark	6,087.1	6,224.0	6,587.2	6,935.0	7,225.2	7,577.7
Finland	4,222.2	4,274.9	4,507.5	4,827.8	5,152.7	5,497.5
France	44,533.7	44,420.7	45,693.0	48,236.3	51,225.2	54,336.3
Germany	55,507.2	54,468.9	55,718.3	58,522.9	61,690.0	65,209.3
Greece	1,580.8	1,671.3	1,801.2	1,981.7	2,203.1	2,393.4
Ireland	2,015.3	2,008.4	2,114.9	2,287.2	2,459.5	2,625.7
Italy	21,940.4	22,595.8	23,746.3	25,669.1	27,759.7	29,626.3
Netherlands	14,029.3	14,070.6	14,468.7	15,401.8	16,447.3	17,393.0
Norway	4,300.6	4,411.4	4,588.0	4,845.6	5,152.8	5,479.6
Portugal	2,223.3	2,316.2	2,472.2	2,739.2	3,033.1	3,248.2
Spain	11,158.2	12,155.9	13,154.2	14,465.0	15,880.5	17,164.0
Sweden	9,610.1	9,343.2	9,651.5	10,195.8	10,868.5	11,602.6
Switzerland	9,652.4	9,752.2	10,234.2	10,900.9	11,401.4	12,036.4
United Kingdom	56,858.4	57,118.9	59,176.9	62,355.1	66,157.8	70,069.9
Western Europe total	256,873.7	258,215.8	267,944.1	284,357.7	302,667.6	321,264.9
Worldwide total	863,139.8	868,835.6	910,328.8	968,386.8	1,033,878.1	1,100,682.9

Note: See Table 457 for key forecast assumptions.

Source: IDC, June 2003

FORECAST ASSUMPTIONS

Table 457 illustrates the forecast assumptions used to develop this version of the *Worldwide Black Book*.

TABLE 457

KEY FORECAST ASSUMPTIONS FOR THE WORLDWIDE IT MARKET, 2003–2007

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Macroeconomics				
GDP growth	In June 2003, Consensus Economics forecast 2.1% GDP growth worldwide; IDC takes a -1 standard deviation.	**High.** There is a positive correlation with a stable economy, and a negative correlation with the downside scenario.	↔	★★☆☆☆
Corporate profits	Lower oil prices and productivity gains will yield modest profit growth.	**High.** A rebound in corporate profits will trigger IT spending increases; weak profits will inhibit spending.	↑	★★★☆☆
Inflation	There will be no inflation.	**Low.** Barring extreme scenarios such as deflation, inflation is not currently a major concern.	↔	★★★☆☆
Interest rates	Interest rates will remain low in the absence of inflationary pressures.	**Moderate.** Low interest rates make it cheaper for firms to finance investment.	↑	★★★★☆
Stocks	There will be a slow recovery in the second half of 2003.	**Moderate.** An economic recovery can impact firms' cost of capital and business confidence.	↔	★☆☆☆☆
Technology				
Killer apps	There will be no new killer apps.	**High.** A paradigm shift can accelerate growth outside of GDP correlation.	↓	★★★★☆
Replacements and upgrades	A proportion of technology infrastructure has reached the end of its useful life, making replacements and upgrades essential.	**Moderate.** Some organizations are willing to redefine performance measurements to control costs.	↔	★★★★☆

Legend: ★☆☆☆☆ very low, ★★☆☆☆ low, ★★★☆☆ moderate, ★★★★☆ high, ★★★★★ very high

Source: IDC, July 2003

ESSENTIAL GUIDANCE

We have deliberately taken a conservative approach to our expectations for the remainder of 2003 and 2004. Forecasts remain fluid and should be regarded as a moving target in the current, uncertain climate. Wild card events remain potentially disruptive in all regions.

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Based on our relatively conservative set of assumptions, we expect to see the global IT industry growing slightly faster than nominal GDP in the coming years. The lack of paradigm shifts on the scale of the Internet, the PC, or Y2K, while keeping overall growth below the levels of the 1990s, will be counterbalanced to some extent by pent-up demand, innovation, and productivity-focused initiatives. The economy is key to our assumptions in every region, and our forecasts are based on an assumption of relatively stable economic conditions over the next five years.

Emerging markets continue to offer the best growth opportunities, particularly in hardware segments. China will continue its advance toward becoming one of the largest IT markets in the world, growing at double-digit rates from 2004 onward. Other fast-growing, but smaller, market opportunities can be found throughout Asia, Eastern Europe, Latin America, and the Middle East and Africa. Western Europe, although inhibited in the short term by economic conditions, represents major opportunities due to rapid adoption of mobile devices and lower overall penetration rates than the United States. On the other hand, the rapid GDP and profit growth that economists expect to see returning to the United States will drive an IT spending pickup. Economic assumptions for Canada are less optimistic, based partly on negative currency factors in relation to the United States.

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We have entered a period of lower growth rates and expectations for the industry, in the aftermath of the carnage experienced in 2001 and 2002. The telecom winter is currently expected to end sometime around 2005, which will remove one of the most significant inhibitors of overall market growth. Pent-up demand will likely spur a fairly significant pickup in infrastructure spending in the second half of 2003, impacting shipments of servers, PCs, and storage and network equipment, but price competition will continue to be a factor. The software complexity crisis will continue to inhibit implementation and decision-making speed but will also spur innovation and demand for more integrated solutions. The trend toward outsourcing of specific IT functions will continue as organizations remain focused on IT cost savings as a hangover and a legacy of the recent downturn. An increased focus on productivity, at the expense of competitive positioning, in relation to IT is expected to be a key demand at the CEO level.

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The industry is far from dead, nor even close to retirement. A period of adjustment will almost certainly be shattered by major innovation in the future, leading to another boom-bust cycle (though perhaps not as dramatic as the one just experienced). As in the 1980s, the transformation of the industry over the next five years will include vendor consolidation, technological breakthroughs, and major shifts in end-user demand. The fog of uncertainty has not yet lifted entirely. We are, after all, in an unprecedented environment. A wide range of opinions and predictions can still be found and defended. Our conservative view, on both the upside and the downside, represents a middle-ground consensus of expectations. It is one that, even at its conservative edges, anticipates a relatively healthy and expanding industry in the years to come.

The fog of uncertainty has not yet lifted entirely.

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